winPOS

Tutorial

OfficePos
Cloud Online Point of Sale Software

1. winPOS

OfficePos is designed to operate with the simplicity of a cash register, with maximum functional possibilities of a PC, which provides great flexibility in business.

Manages sales of a simple, powerful and robust way. The display can be traditional or touchable. It's a product designed to be used by POS terminals its main features are: multi-business, configurable touchscreen, barcodes, declaration of funds or closing cash, purchase history, inventory, managment of tables (hospitality) user and security systems, etc.

a) *Officepos users*

When OfficePos account is created, automatically is created too one officepos user. With this user account, you can access OfficePos web, and the POS, installed under Windows. The OfficePos users are only used for identification inside in the system.

- FREE users: Suitable for small business with ONE store and POS and limited transactions. You can keep a catalog of items (no photos) with a maximum of 500 references and 500 lines of sales transactions per month.
- PREMIUM users: Suitable for businesses with more than one store or more than one POS. There is no limit of items, or monthly transactions, and lets you keep working at the POS when Internet falls down. You need as many users as POS works simultaneously. OfficePos user can only be connected to a POS at a time.

http://www.officepos.com/index.php/pricing-officepos

b) *Information*

Before you start, you have to consider a number of issues:

- It's recommended to run the installation with administrator permissions. Select the Setup.exe file, click the right mouse button and select "Run as administrator". This way you ensure that all services are installed without troubles
- Initially, OfficePos provides a basic environment to use the POS. From the web Officepos, is already created a company default, a shop, a POS, categories, products, etc ... If you want, you can customize your environment before installing OfficePos. Pay attention to store, POS, categories, products, taxes and payment methods.
- If you use peripherals such as customer display, cash drawer, receipt printer or invoices, scales, etc. ... It is advisable to collect the necessary documentation for proper configuration POS

c) *Minimun required*

- Advised a minimum of 1 GB of RAM.
- Windows Operating System (XP, Vista, W7, W8, …)

d) *Company*

You can go there from OfficePos website, Administration-> Setup.

It's recommended to fill the information identifying the company as well as the rates and taxes that will be used in store. It is also convenient fill other data to the POS terminal such as: currency, language, number of decimals in the amounts, prices, etc

e) *Store / POS*

Only OfficePos Premium users can have more than one store and POS. To create them, must be accessed from OfficePos website, stores menu. When saving a store will be generated automatically one POS. You can also specify other store data such as name, rate, language, etc. By default, the initial receipts counter will be 0.

f) *Payment methods*

From OfficePos website, Administration -> Payment methods. All payment methods may be used in the POS, you can enable or disable (to make visible or not at the POS) from the menu. Payment types Cash and Card are fixed.

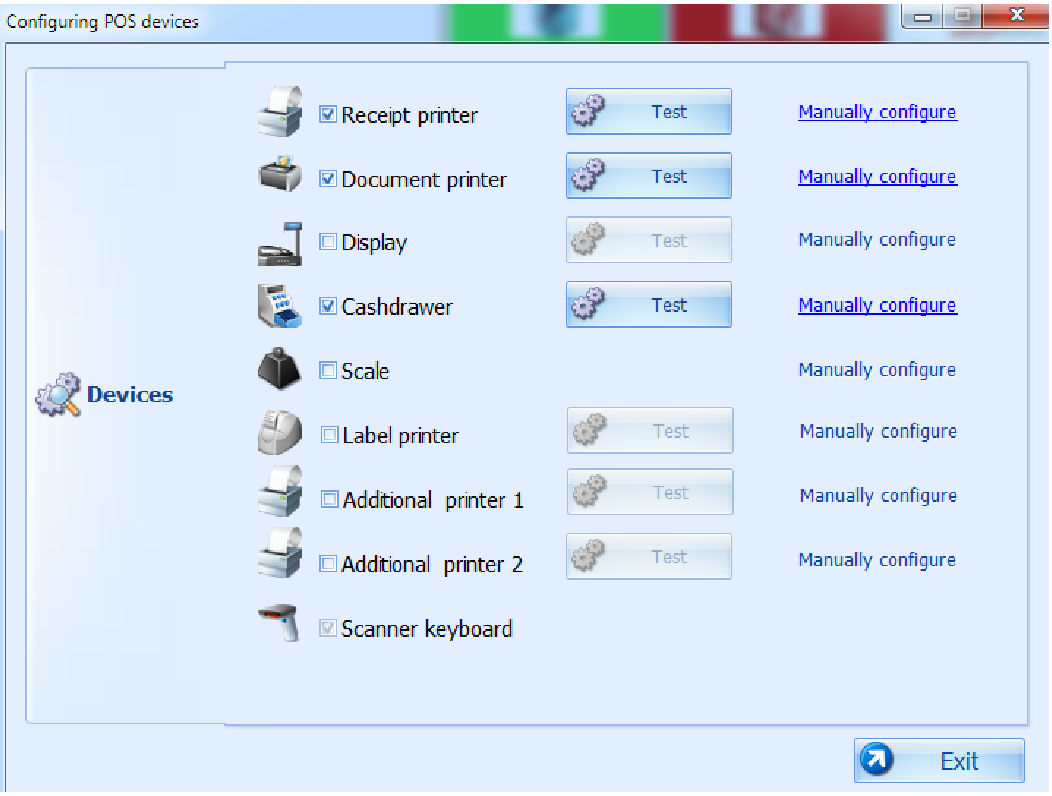
g) *Employees*

From OfficePos website, Stores➔Employees/Cashiers. You can create new employees, or edit them, and change their permissions (supervisor, manager or employee).

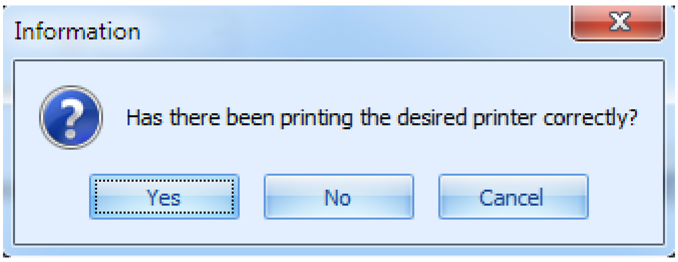
Note: Employees are people use the POS to make sales. Don't confuse with OfficePos users! OfficePos users are only necesary to identify your company in our system. You need the same OfficePos users as POS you need selling at the same time, but you can create infinite employees.

h) *Peripherals*

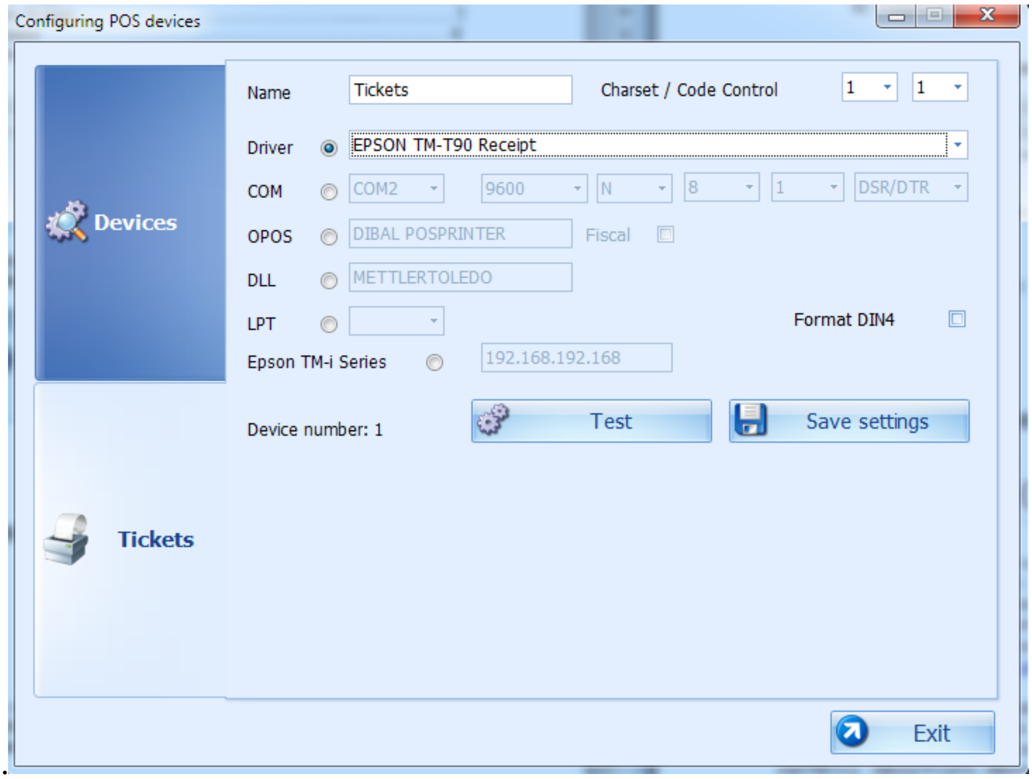
You can access peripherals configuration from POS, menu File ➔Preferences ➔ Peripherals ➔ Advanced settings



Using the test, OfficePos will detect the device automatically, and print test page if device is a printer.

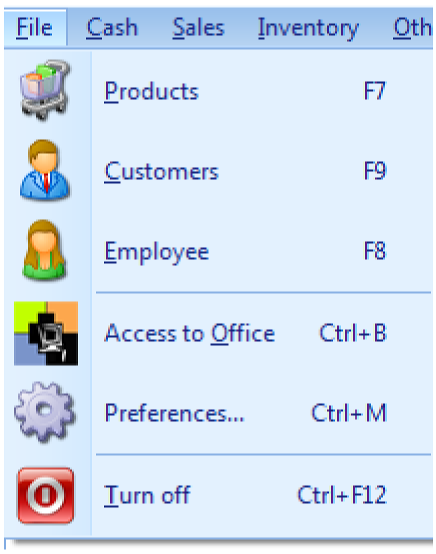


If the test is successful, clicking on "Yes", the device will be configured. You can configure peripherals manually, by clicking on " Manually configure". Each type of device has several charset / control code.



When all devices are configured, save settings and exit.

2. File management



a) *Select product*

You can select products to sell writing the code on the screen, using a barcode reader or choosing it from the list.

To access the list use the button on the action bar (Products) or the option File ➔Products. From this screen, you have the option to see product's record and information about its stock and the stock in others stores. You can also create and edit a product, but in a very basic way. For more details, you must use the OfficePos Web.

From the list screen, you can use the filter to locate any product, you can also use the SEARCH button.

b) *Select customer*

To access the list use the button on the action bar (Customers), or option File ➔ Customers. You can select the customer that the sale will be made, access his record, edit or create a new customer.

By default, sales are made with default customer (parameter *Caja ➔ Configuración ➔ Cliente*) and he does not appear in the list. You have to select a different customer than usual when you want to do any of the following actions:

- Create or use a voucher: If you create a voucher for a sale, you must select a different customer than usual. You can create a new customer, or create a customer named "Vouchers" and use it whenever you want to do a voucher. See Vouchers

- Generate an invoice, delivery note or a customer's order: These documents are always performed with different customer than usual, because it can make a deposit (on account).

c) *Select employee*

To access use the button on the action bar (Employees), or option File➔ Employees. You can select the employee you want, will be the one used in the current and next sales. Name's and photo's employee you will see in the button. If POS has active employee passwords, you only need write the password and the employee is identified.

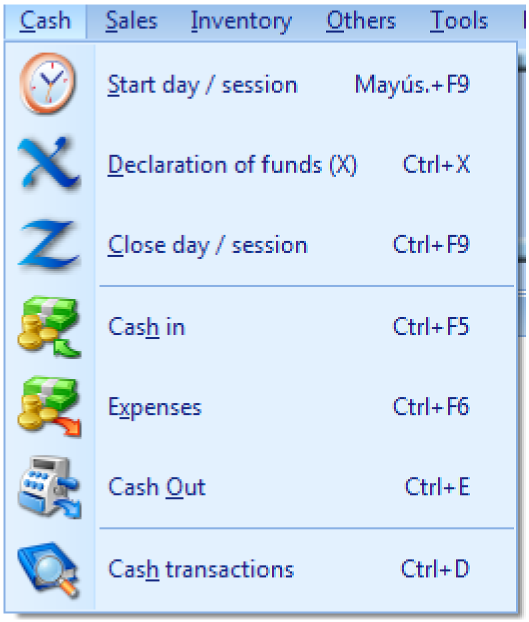
d) *Access to Office*

To Access OfficePos Web

e) *Preferences*

To access use option File➔Preferences. If you select this option POS turns on Design Mode. In this state you can configure the interface screen in real time, change parameters, peripherals, etc ... See.Sectoral dynamic configurator.

3. Cash management

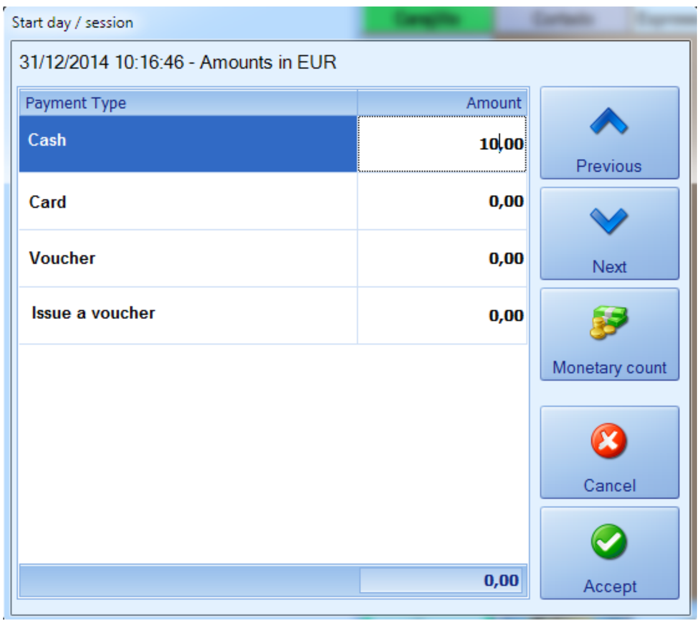


a) *Start day*

Option Cash➔Start day. Sets the initial balance of POS to start a new shift, indicating the initial balances for each method of payment, usually only effective as a provision for change.

Parameter: *ArqueoDeCaja* ➔*Configuración* ➔*InicioDeDiaConFechaAlDiaSiguiente*

When Z generates the start of day, if enabled parameter, this is generated with following day date(end of day), if not, with the same date of Z.



b) *Declaration of funds (X)*

Option Cash➔Declaration of funds(X). When you select this option, shows you a screen where you can enter the amount that you have counted for each method of payment exists. Initially, OfficePos shows you amount has calculated. If you don't want POS propose amounts, use the parameter: *ArqueoDeCaja*➔*Configuracion*➔*ArqueoCiego*).

This function is useful for controlling what has been counted among the different shift changes.

c) *Close day (Z)*

Option Cash➔Close day (Z). Is like the Declaration of funds (X), with the only difference that you can make an outflow of funds (take money out of the cashdrawer).

Z is called because it usually do at the end of the day. Once the declaration is done and accepted the possible cash out, there is no possibility of going back. OfficePos records cash balance and if there are differences, are recorded in the sale's diary as deficits or surpluses.

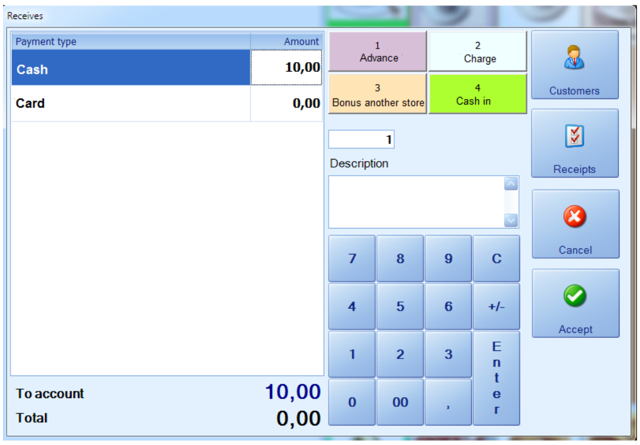
The difference between the declared and the outflow of funds, remains as opening balance for the day or shift following POS.

d) *Cash in*

Option Cash➔Cash in. This function allows you to cancel previous charges on credit sales, on accounts (deposits), cancel vouchers, cash in, etc. From here, you have to do all charges when charge is not from a direct sale, charge will be reflected in the cash journal.

When you select this option, you will see a window with different methods of payment, default selected the usual method of payment (cash), some buttons with the concept of collection, and you must enter the amount of the collection, which will accumulate the balance of currently selected customer.

If you click on the Customer button, you can select the customer's charge. If you want to cancel on account/voucher/ credit just select the customer and then search the collection you want to cancel from RECEIPTS button. Choose the one you want to cancel and accept the operation. When charge is finished, a note is printed.



e) *Expenses*

Option Cash➔Expenses. This function allows you to record the payments you make from the POS (outflows). These payments will be reflected in the cash journal. When you finish payment, a note is printed

f) *Cash out*

Option Cash➔Cash out. You can take money out of the cashdrawer, you can use the preset concepts as bank transfer, headquarter transfer, etc. The outflow of funds must be made for each method of payment. You only need to put the amount in the method of payment, and the concept (which can be changed manually).

There are 2 important parameters:

ArqueoDeCaja➔Configuración➔SalidaFondosVariable: If the parameter is enabled the user can modify the amount to take, if not, the POS will do automatically.

ArqueoDeCaja➔Configuración➔SalidaFondosTotal : If the parameter is enabled, will retire as you entered in POS as start of day, leaving the start of day equal 0. If disable, the start of day for the next day is saved.

g) *Cash transactions*

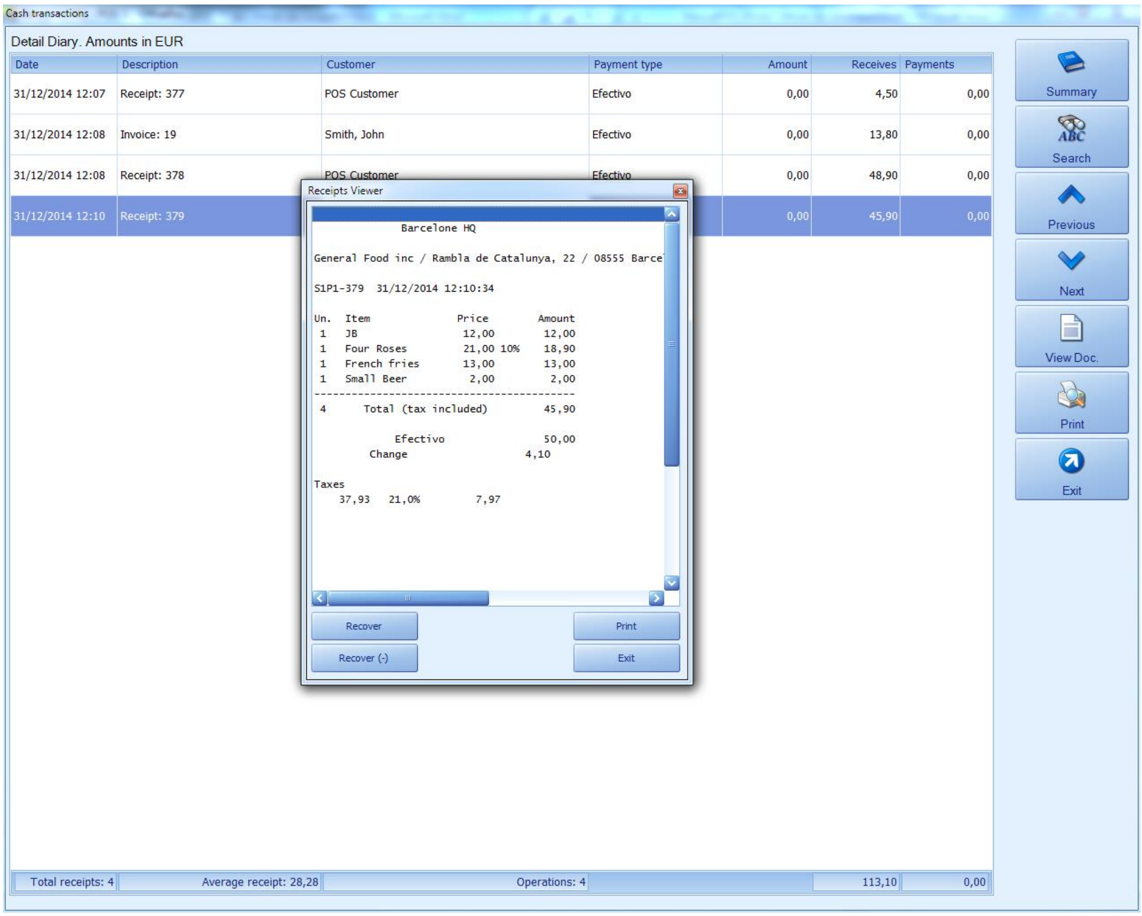
Option Cash➔Cash transactions. In cash transactions you can see every move made during the day, grouped by methods of payment. To see them in more detail, click the DETAIL button. By default the moves that you see are the current POS and current day. On the screen is a Search button, where you can locate receipts through their number, dates, POS, customer, etc ...

From this screen you can see any receipt/invoice done. Select the row, and click on the button "View Doc", you will see the document was done. In the document screen, you'll see that you can do the following:

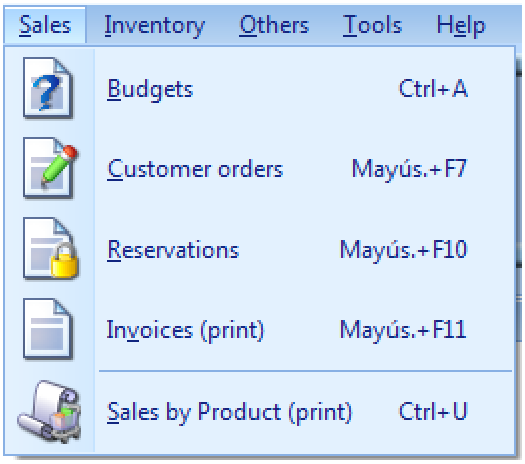
- Print: You can reprint the document.
- Recover (+): You can recover the contents of the document to do a new sale.
- Recover (-): You can recover the contents of the document to do a refund or cancellation

If you want to do an invoice from receipt, you don't need cancel the receipt before, if you select it and then do your invoice, the POS will take care of the cancellation of the original receipt (you will see a message on screen).

You can also print the journal entries, both summary and detailed, clicking the Print button on the screen cash transactions.



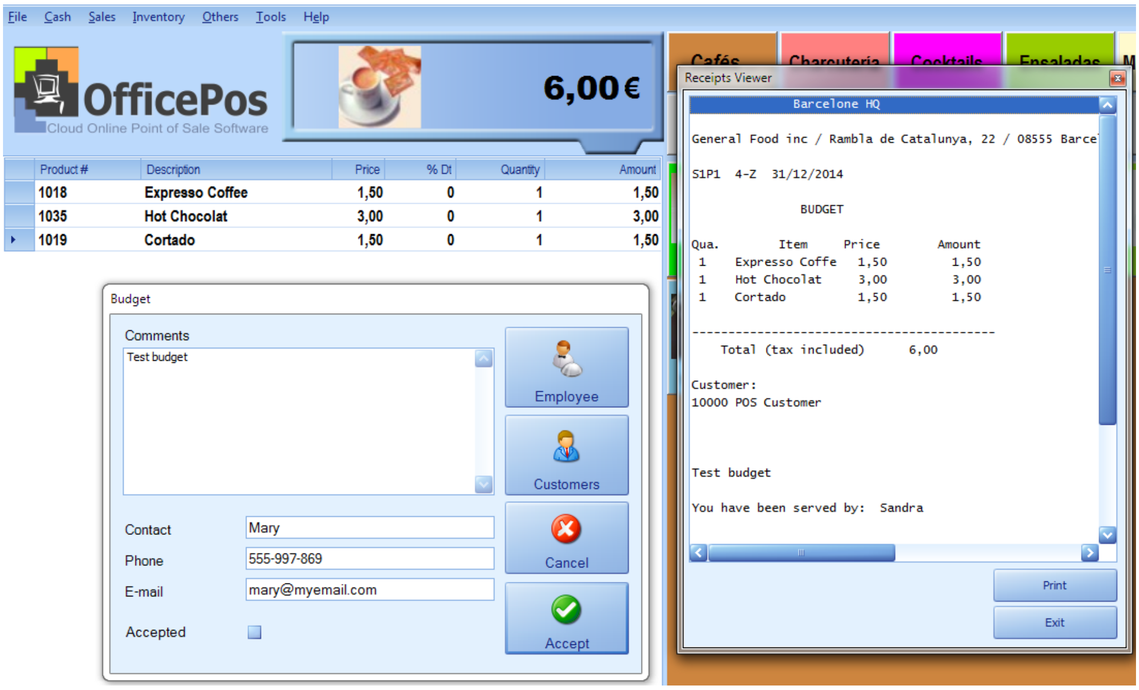
4. Sales management



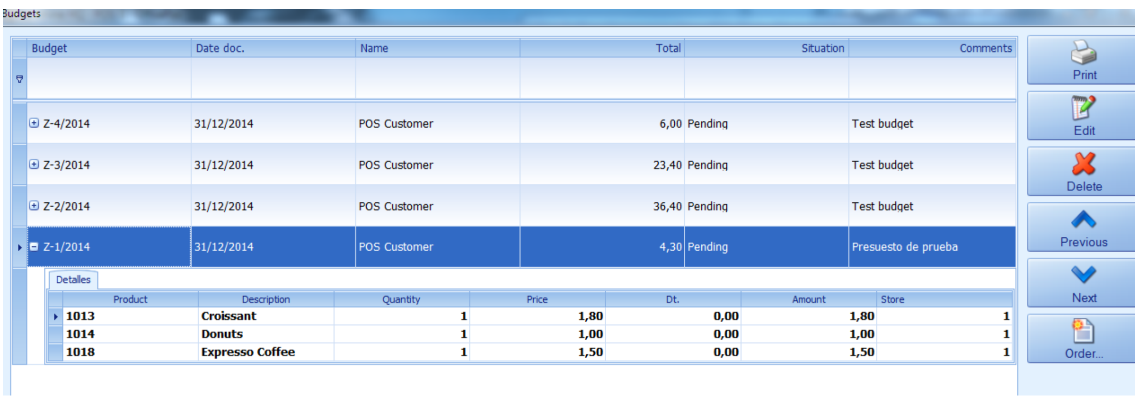
a) *Budgets*

Option Sales➔Budgets or button in bar actions.

- **New budget**: You have to put in the sales screen lines with the products of the budget, and choose option menu Budgets. You can select a customer if you want and fill the rest of the data you think necessary. If you want to send the budget by email, just enter the email address in the appropriate box. Once the budget is completed, it is printed..



1. **Access to budget**: With the sales screen WITHOUT lines (empty), click on the Budget option. You will see to a list of all budgets created. From this screen, you select the budget you want, you can reprint it, edit it or delete it. You can also turn it into an customer order..



b) *Customer orders*

Option Sales →Customers order or button in bar actions.

2. **New customer order**: Enter the necessary products on the screen, and click option Customer orders. If you have not selected a customer, the POS will ask you what is your customer and then a screen to put, if you want, on account, you accept and the order is created.
3. **Access to customer order**: With the sales screen WITHOUT lines (empty), click on the Customer orders option. You will see a list of all the orders created. If you select a order you'll can reprint, let's on account or delete it. You can also convert order to replacement order for the store, or on a delivery customer's note.
4. **Change customer order**: Access the list of orders and select the one you want and press OK. The order is charged on the sales screen. Lines could be modify, add, delete, etc. To save the changes, just select the option Customer orders and POS asks if you want to save it.
5. **Collect customer order partially:** Charge the customer order on the sales screen. Modified units to leave the customer takes and deletes lines with products that still are not going to serve. Once you have exactly what the customer will pay, press the button PAY and POS asks you if you want make a partial payment (pay part of the customer order and leave the rest as pending), if the answer is yes, the partial payment will be done and the rest will be left pending. If the answer is no, pays what is on screen and the customer order is over.

c) *Reservation*

Option Sales →Reservations or button in bar actions. It works exactly like customer orders. The only difference is that the order quantities are in a "pending to serve" state and quantities of reserves are "reserved".

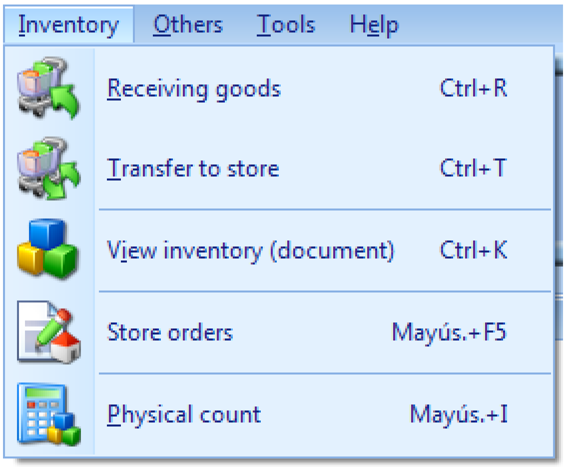
d) *Invoices (print)*

Option Sales→Invoices (print) or button in bar actions. You can print a invoice of sale you have on screen. It is useful in shops hospitality where printing receipt/invoice is made before the customer pays. It works the same way as the "print ticket" button is enabled on the action bar, but printing an invoice.

e) *Sales by product*

Option Sales→Sales by product or button in bar actions. To print sales made of a period, products or grouped by categories. For each product you will see its current inventory, units sold, the total amount of sales, the price at which it sold and the price rate of the moment. If there is any difference between the selling price and the price rate, the line is marked with an "*". You can also see the total units and the amount for the period.

5. Inventory



a) *Receiving goods*

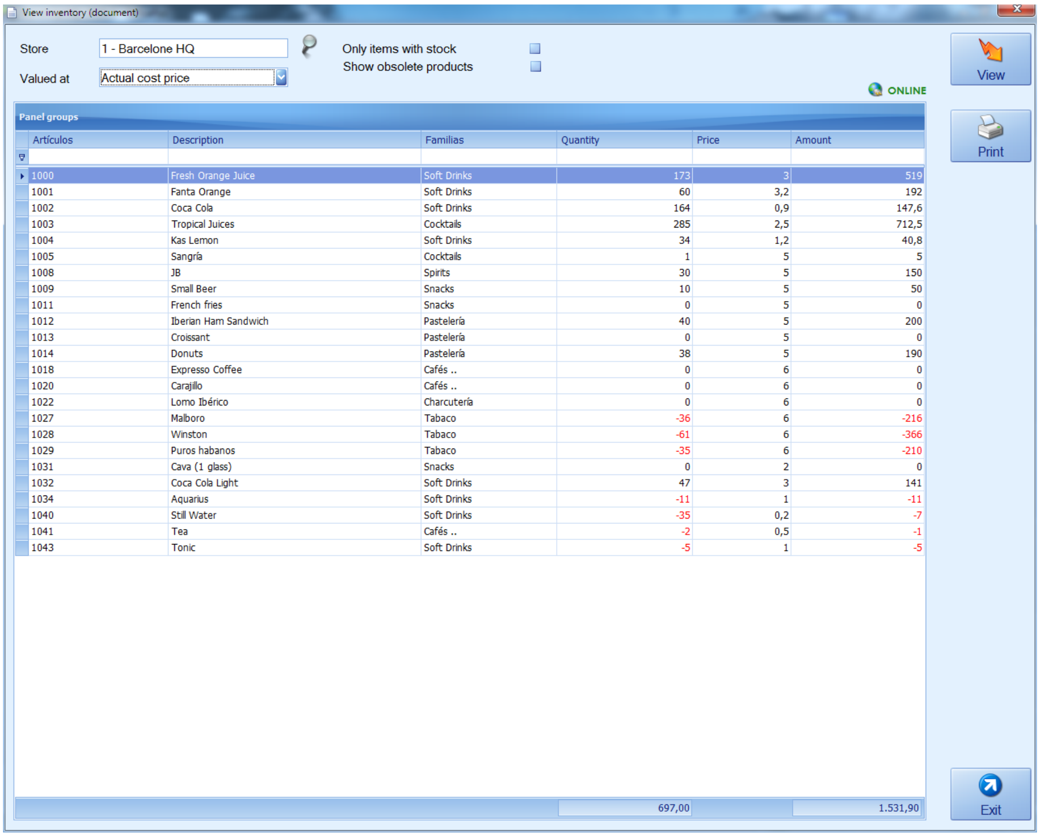
Option Inventory➔Receiving goods. It is used for material that has sent me another store (if you have more than one store in your company). You will see a screen with a list of delivery notes pending transfer. You can confirm that and adjust the quantities taken if you have to do. Only available if the option "Validate incoming goods" is enabled in OfficePos Web (Administration➔Setup) .

b) *Transfer to store*

Option Inventory➔Transfer to store. You can send materials to another store (if you have more than one store in your company). Before accessing this option, you have to add the corresponding lines in the sales screen. Once incorporated, you click on the menu and choose the store you want to be send it.

c) *View inventory (document)*

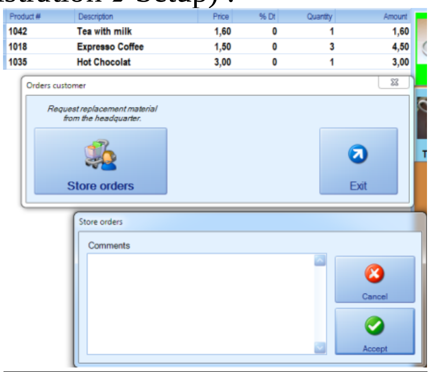
Option Inventory➔View inventory (document). It shows you information on the current state of inventory. You can print a report with this information.



Artículos	Description	Familias	Quantity	Price	Amount
1000	Fresh Orange Juice	Soft Drinks	173	3	519
1001	Fanta Orange	Soft Drinks	60	3,2	192
1002	Coca Cola	Soft Drinks	164	0,9	147,6
1003	Tropical Juices	Cocktails	285	2,5	712,5
1004	Kas Lemon	Soft Drinks	34	1,2	40,8
1005	Sangría	Cocktails	1	5	5
1008	JB	Spirits	30	5	150
1009	Small Beer	Snacks	10	5	50
1011	French fries	Snacks	0	5	0
1012	Iberian Ham Sandwich	Pastelería	40	5	200
1013	Croissant	Pastelería	0	5	0
1014	Donuts	Pastelería	38	5	190
1018	Expresso Coffee	Cafés ..	0	6	0
1020	Carajillo	Cafés ..	0	6	0
1022	Lomo Ibérico	Charcutería	0	6	0
1027	Malboro	Tabaco	-36	6	-216
1028	Winston	Tabaco	-61	6	-366
1029	Puros habanos	Tabaco	-35	6	-210
1031	Cava (1 glass)	Snacks	0	2	0
1032	Coca Cola Light	Soft Drinks	47	3	141
1034	Aquarius	Soft Drinks	-11	1	-11
1040	Still Water	Soft Drinks	-35	0,2	-7
1041	Tea	Cafés ..	-2	0,5	-1
1043	Tonic	Soft Drinks	-5	1	-5

d) *Store Orders*

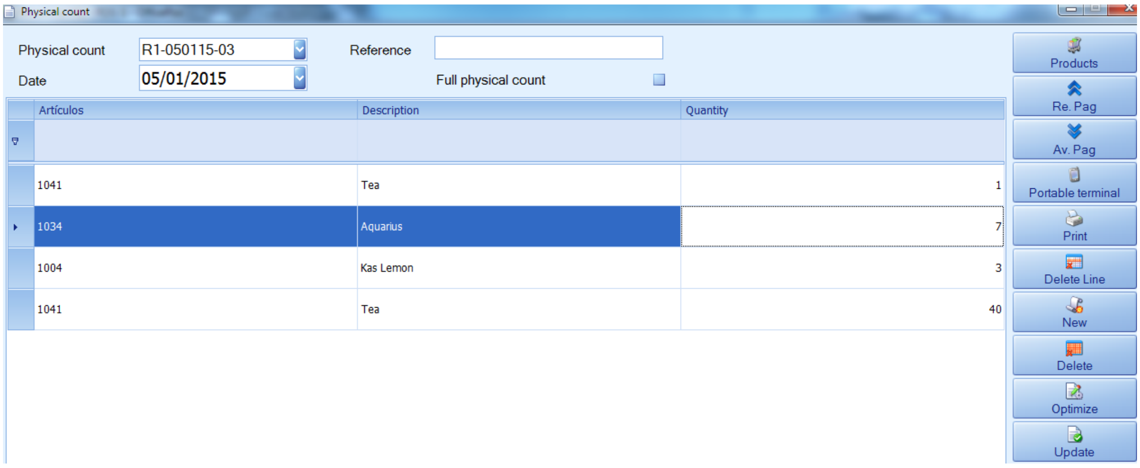
Option Inventory➔Store orders. You can do orders for replenishment of material to the headquarter. Add lines with the products and quantities you order and then select this option. Replacement order will be created in the headquarter. When headquarter sends you the material will generate a delivery note of transfer, which can be seen from the "Receiving Goods" option, if the option "Validate incoming goods" is enabled in OfficePos Web (Administration➔Setup) .



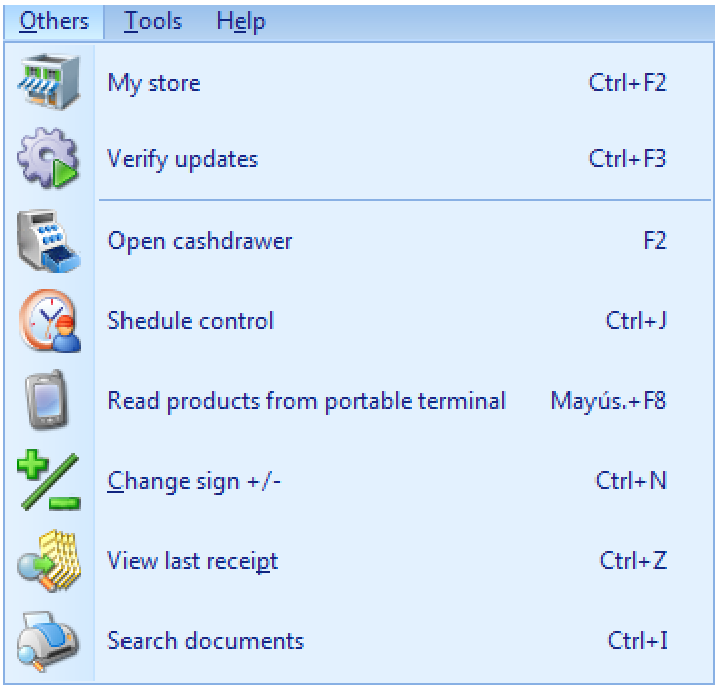
e) *Physical count*

Option Inventory→Physical count. It allows you do a partial physical count (only physical count products that you have made are updated) or make a Full physical count (updating physical count products, and leave the rest with a stock = 0). You can enter the products and quantities from the sales screen, and then select the menu option, or you can put them directly into the physical count screen. Once you have all the products, you have to click on the OPTIMIZE button (POS optimizes physical count grouping lines per product) and then on UPDATE.

Note: You only can do a physical count with products marked with "Inventory management".

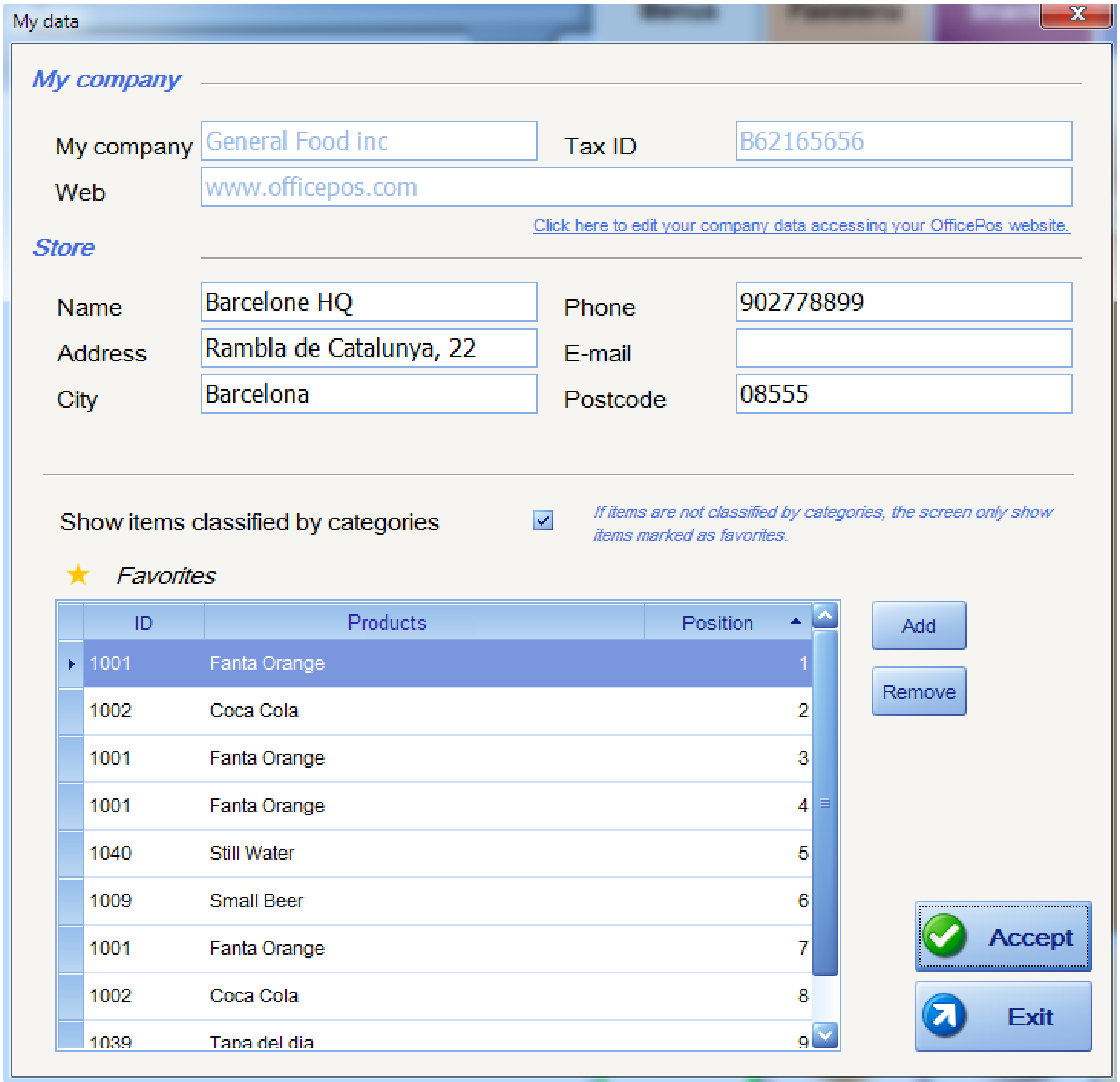


6. Others



a) *My store*

You can modify the basic data of your store, without having to access the OfficePos web. You can also manage your favorite products you see on the main screen. You can choose if you want to see only favorites or see the different categories of all products.



b) *Verify updates*

OfficePos automatically checks for new updates every Monday, Tuesday and Wednesday, other days it does not. If you want to check manually, just select this menu option.

c) *Open cashdrawer*

If a peripheral cashdrawer is properly configured, OfficePos opens if you select this menu option (the same for the button in the action bar).

d) *Shedule control*

You access similar screen of employees, but with Clock in and Clock out buttons. You must first select the employee and then click an entry or exit.

With the print button, you will see the entries, exits and total hours worked by an employee (whether before you have selected one) or to all employees. You can also choose a time period for the hours.

With parameter *Impresión*➔*ControlHorario* ➔*MaxHorasEntreMarcaje* in print you can configure a maximum hours between entry and exit (0 unlimited). If the value exceeds this number of hours, is replaced by the parameter content.

e) *Read products from portable terminal*

Access files generated by portable terminals readers and puts its contents in the screen sales. Reader compatible models:: CASIO DT-700, INTERMEC M90, METROLOGIC SCANPAL 2, UNITECH HT630, CIPHER 8300, METROLOGIC OPTIMUS S.

f) *Change sing +/-*

If you select a row in the sales screen and then select this menu option, you change the sign to the amount. You can also do putting you over quantity and change the sign directly.

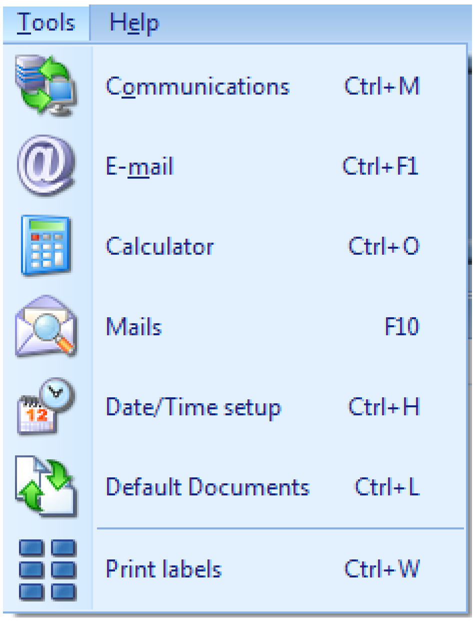
g) *View the last receipt*

You can see the last sale impression, you also view clicking on the display screen sales.

h) *Search documents*

Allows you locate any document entering its code. You can use the "*" if you want. Once set a code, you press the Search button and you will see a list of all the documents that match the pattern. If you select any of them, you'll see by clicking on the View Doc button.

7. Tools



a) *Communications*

OfficePos has a communications system that synchronizes data from the web to POS. By default this synchronization occurs every 10 minutes, but you can "force" if you want. Synchronization can be launched by clicking on the SYNC button, or if you want the POS again receive old data, you can force synchronization changing the date. For example, if you wants the POS again receive all the changes that have occurred in the web from the last 48 hours, simply change the date and decrease it two days. Once the data has been received, the POS will receive a message.

b) *E-mail*

The POS launchs the email program that you has configured on your system.

c) *Calculator*

The POS will launch the Windows calculator program.

d) *Mails*

You will see all messages that the web or other stores have sent you. From here you can also send messages to other stores (if the company has more than one store). When you receive a new message, you will see a sign on the display screen. If you click on the sign will direct you to the message screen.

e) *Date/Time setup*

The POS launch Windows clock. Be especially careful, because if the user changes the system time, the sales made from that POS will be saved at the time of the machine.

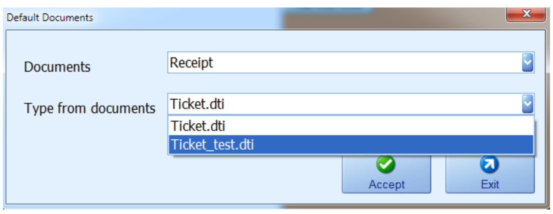
f) *Default documents*

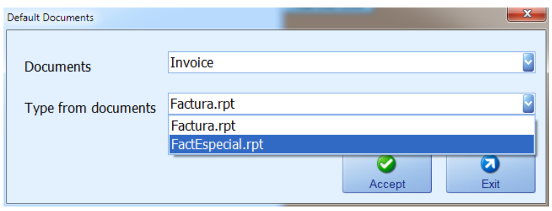
The POS uses templates for prints of different documents, tickets, invoices, orders, etc ... Exist 2 types of templates, RPT and DTI.

The RPT are DIN4 format documents are printed document standard printers. DTI templates formats, are often used by printers to print tickets, with a format of 40 characters per line and paper rolls.

To establish that a document using a template or another you should access the Design Mode File➔Preferences➔Documents. From this option, you can decide If a document uses an RPT file or a DTI file, also the number of peripheral (printer) which is going to start printing.

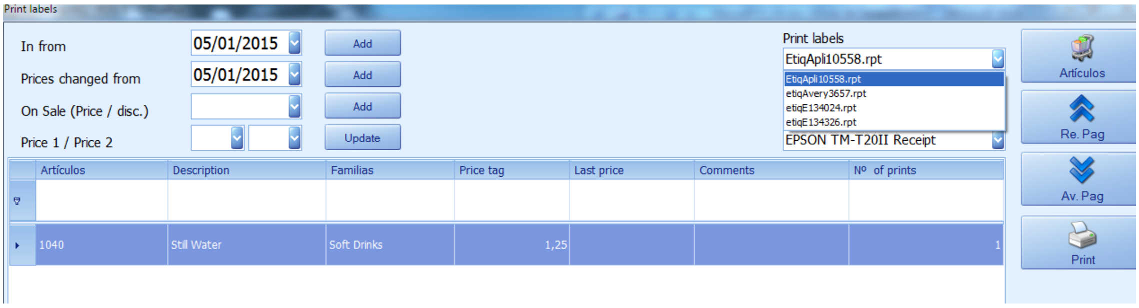
You can put different templates that will use a document separated by ";". If you want to change the template at some point, simply access the option "Default documents" menu and select the new template. You can NOT mix types in one document template, all templates will DTI or RPT. See DTI's Configurator.





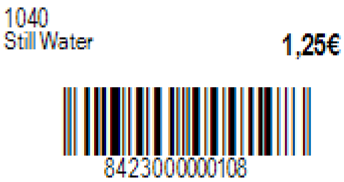
g) *Print label*

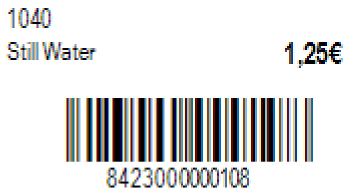
OfficePos allows you to make labels to identify products. It offers the most popular models of labels and we recommend using the right model for each. You can select the products you want to label based on different criteria: Products which have changed their prices, which are on offer, etc. You can also select the products entering them directly in the sales screen and then selecting this menu option, or by adding in your own screen printing labels. By default the label quantity for each item is the current stock, but you can change this value if you want to modify the box "Nº of prints".



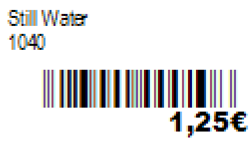
Label types:

EtiqApli10558.rpt (APLI ref. 10558 11x4) - EtiqAvery3657.rpt (AVERY ref.3657 10x4)





EtiqE134024.rpt (1x1) - EtiqE134325.rpt (APLI ref. 01776 13x5)



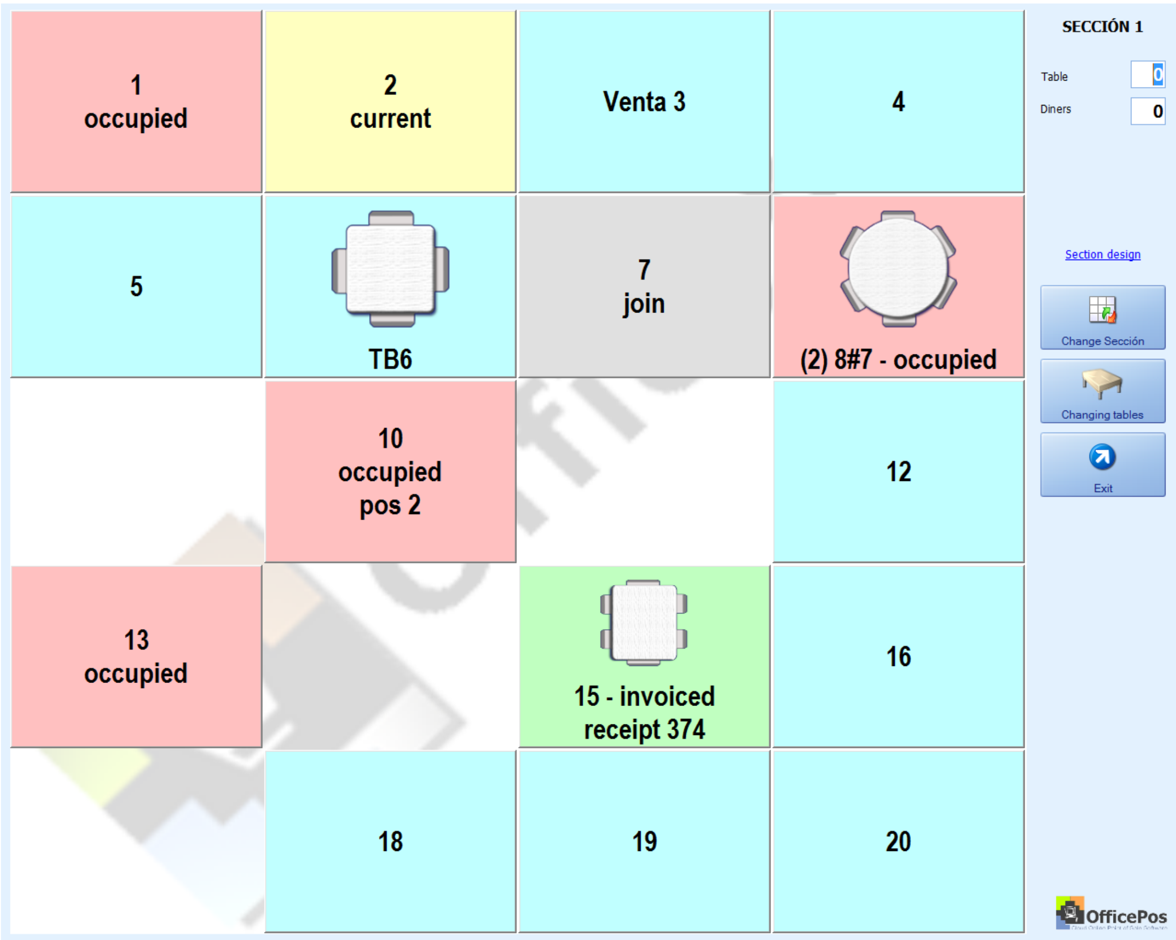
8. How to do

a) *Hold sales*

You can leave hold sales to recover and collect them later. To recover a sale press the button on the action bar "Hold sales", and you will see all the hold sales /tables. Click on the sale you want to retrieve and content sales will add to the sales screen. Once on screen, you can modify, charge or do any of the available functions. You have to consider that hold sales can be selected by any other store POS, but never be active in 2 POS at the same time.

There are different states for sales / tables, and can be identified by colors.

- Empty/free: Sale/table without sales rows.
- Ocuppied: Sale/table with sales rows.
- Invoiced: Sale/table with receipt/invoice printed but NOT charged yet.
- Join (Only Hospitality): The table has been attached to another account from another table.



Fore more information see Table situation

b) *Charge a sale / invoice*

Completed the sale click the button on the action bar PAY , you have to consider the following things:

- To make the sales payment, it's not necessary to have sales in invoiced situation (this situation is actually used in hospitality). Each time a sale is charged, print receipt or invoice is generated if it has not previously
- In case there is a cashdrawer peripheral created , it opens automatically when you confirm the payment.
- By default, the total amount of the sale comes in the method of payment Cash
- If the amount is negative, it may issue a voucher
- A voucher can be used as a method of payment, just select the customer to which it belongs, and look for it through VOUCHERs button. If it is less than the amount of the new sale, the remaining amount you have to put in another method of payment, but if it is higher, you can make a new voucher for the difference. See Voucher.
- From this screen and **selecting a customer**, you can charge doing an invoice. (INVOICE button).

c) *Voucher*

Treatment voucher is only available for establishments that are NOT Hospitality type. To create and collect vouchers you have to have enabled the two methods of payment, one for create them and one for vouchers reception.

- Create vouchers. To generate a voucher, the amount of the sale has to be negative and you have to put the total amount in the method of payment voucher.
- Receive vouchers. To use a voucher when the customer pays, you have to select first the customer, and then use the vouchers button to locate it. OfficePos allows you to select multiple vouchers for use at the same time
- Money back or cancel a voucher. You can return the amount of a voucher using the menú Cash➔Cash in). You have to select the customer and then use the Receipts button to search the voucher you want to cancel. You select it (the screen you'll see the negative amount), you use the method of payment you want to return and click OK.

d) *Refunds*

To do a return of a sale only have to select the sale and going to cash transactions (Cash➔Cash transactions).

Once located the sale, you click on the "View doc" button and select the "Recover -" option. This sale will be put on sales screen with negative sign.

From there, you click on the PAY button and you can make a receipt / invoice and generate a voucher or money back.

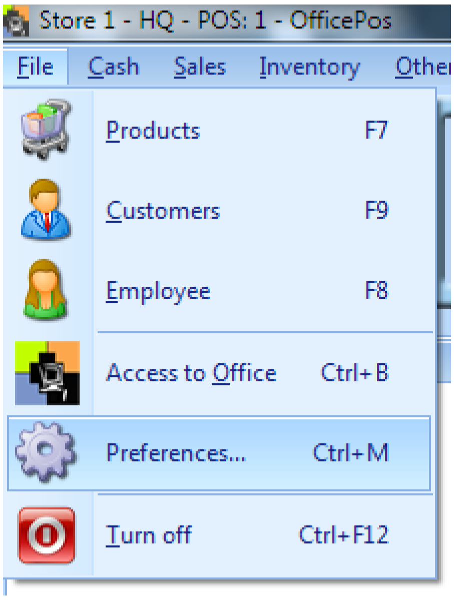
You can also add new lines when you have the original receipt on screen, this way is equal that the customer returns the product but takes another change. If the result of the sale is positive (products takes more value that products returned), a normal sale is made. If the sales value remains negative, Officepos will proceed in the collection to the generation of a voucher or refund the difference.

9. Sectoral dynamic configurator

The POS incorporates a virtual designer to visualize the changes made to the configuration screen in real time.

a) Starting the design mode

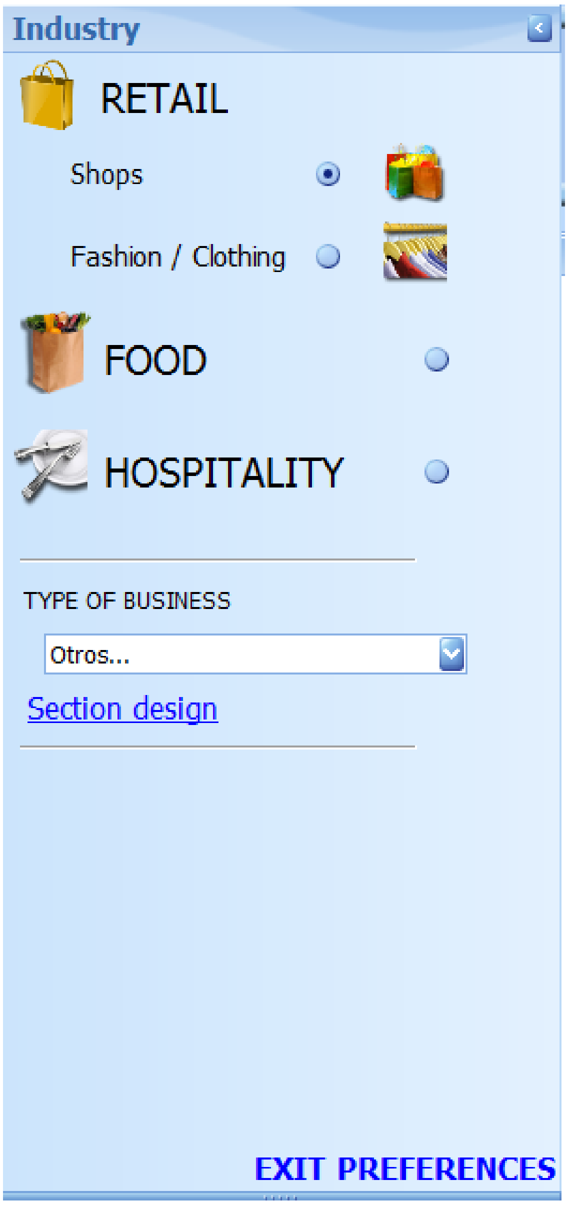
To access the design mode run POS and select menu *File*➔*Preferences*

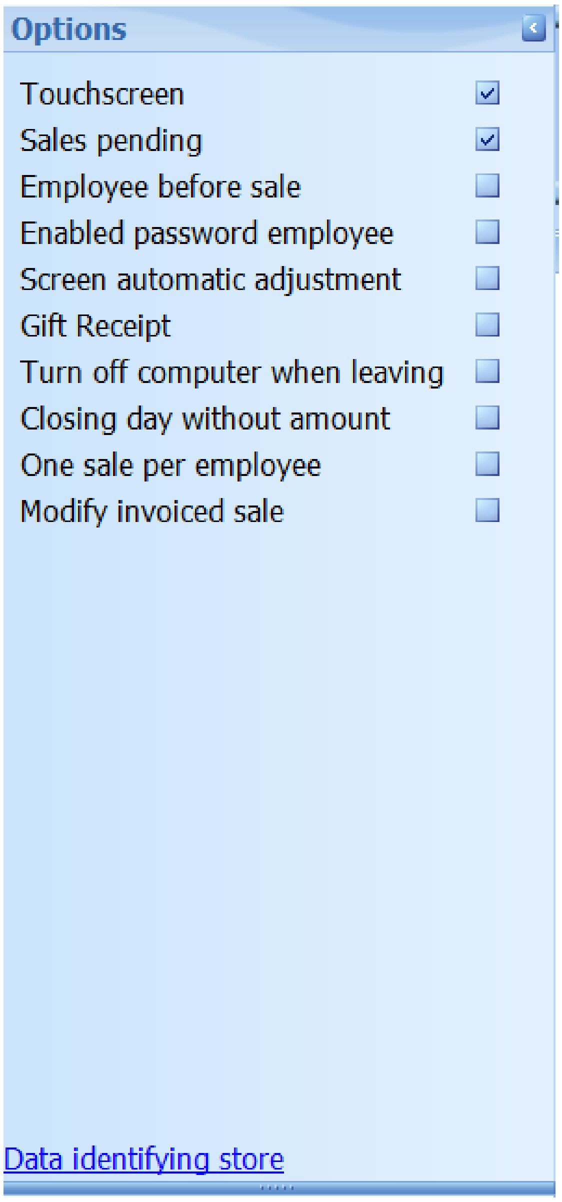


After selecting this option, the POS changes it to DESIGN mode and you can start doing the changes you want. To exit design mode and return to work mode, simply reselect the same menu, or click the lower left corner of the status bar, where puts Exit preferences.

b) Configuration panel

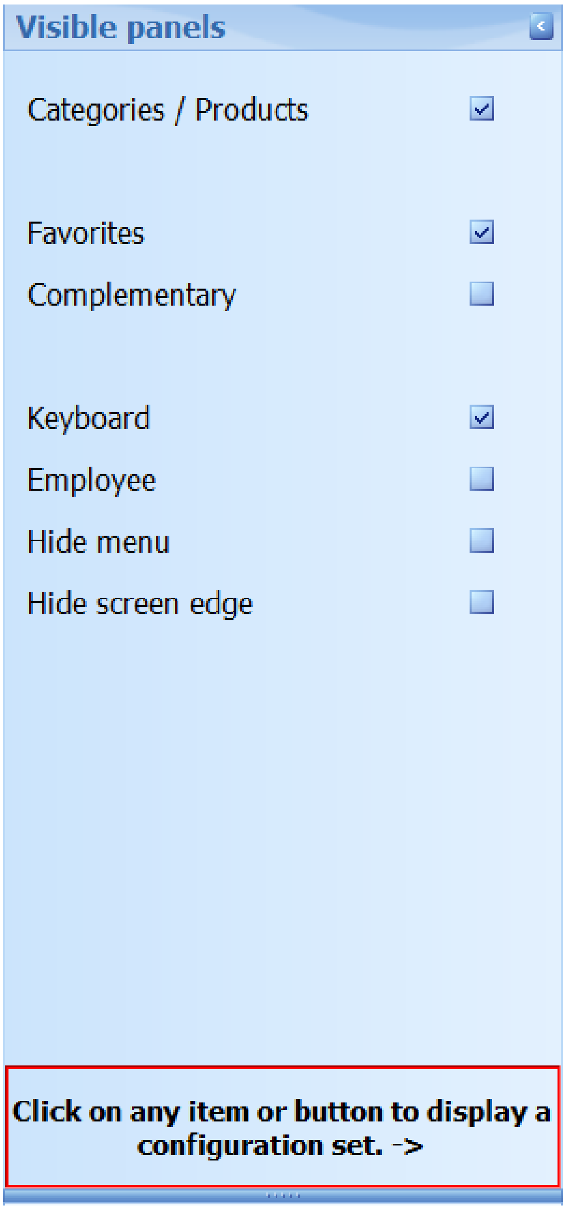
When you enter design mode, OfficePOS disables the buttons and menu options. You will see on the left side, a task pane with several options you can use, in the following pages we explain the contents of each.





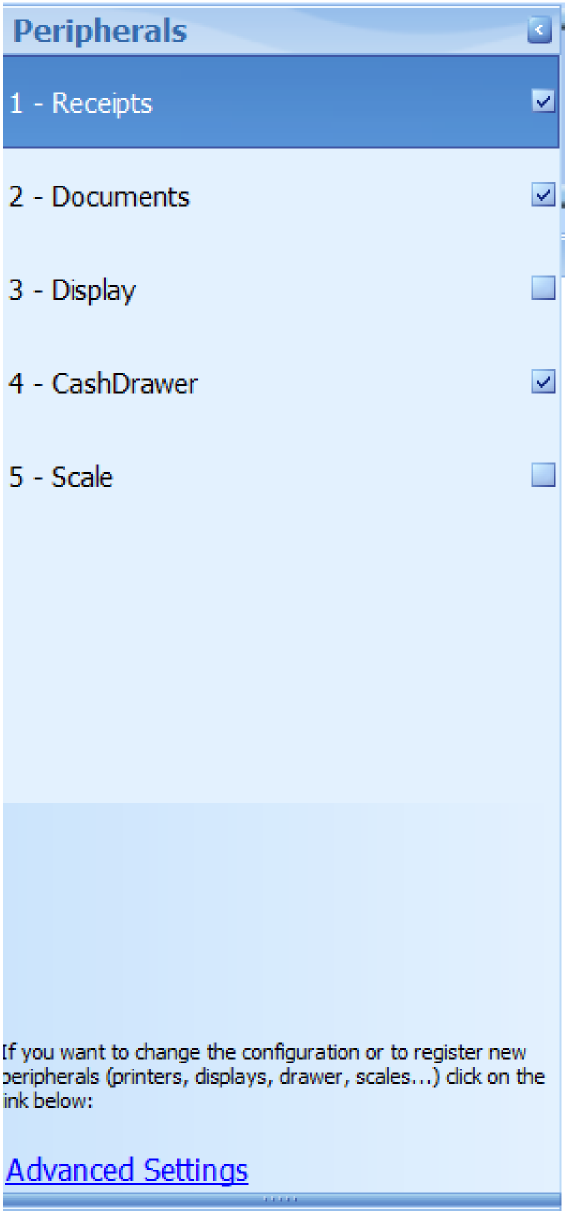
From this panel you can change the industry and type of POS business.
Each sector and type of business has particular specifications (display panels, features, buttons, etc ...), so, changing some of these options will do POS ask before saving changes

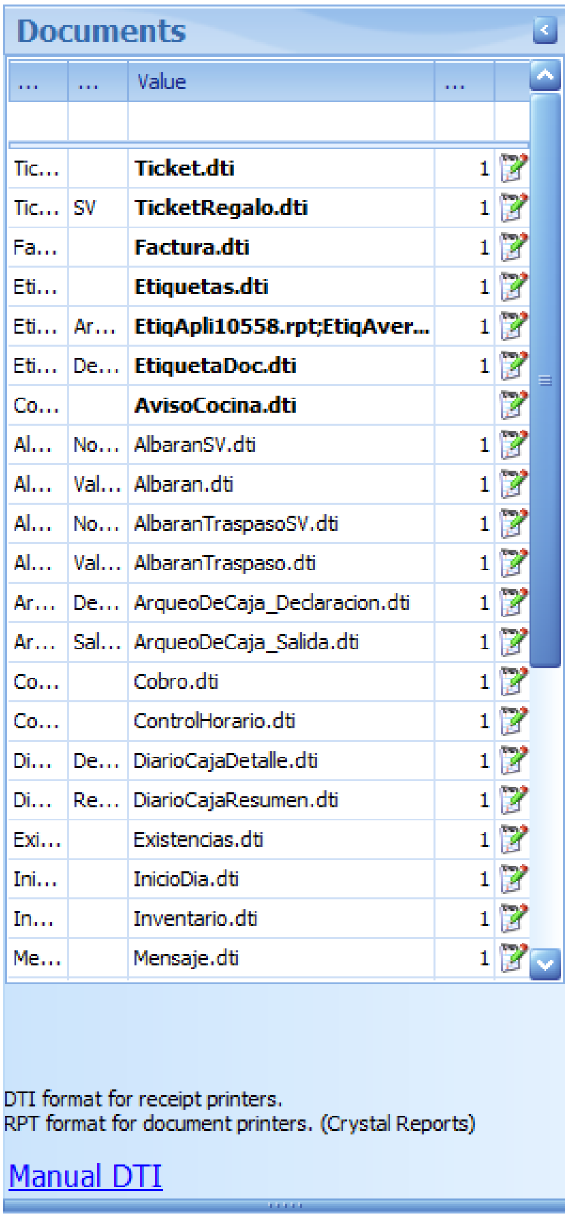
To modify the most used POS functionalities, diplay touchscreen or not, you can activate hold sales, passwords, ask for the gift receipt... etc.
You can also access to data basic store..



You can choose which items you will see the screen. Clicking on any item on the screen (section items, categories, taskbar, or any button) you can customize each.

Select the skin you want for POS. There are many themes to customize it.





Common peripherals for POS. You can enable or disable them. To create, delete or view a more detailed configuration press "Advanced Settings".

You can view the documents or templates that POS uses, you can edit its name, extension, and the number of peripheral for printing. You can also edit and modify reports, selecting the row in which it is located and clicking to the Edit icon. For more information about modifying templates DTI type, click on Manual DTI.

OfficePos
Cloud Online Point of Sale Software

c) *Setting the screen elements*

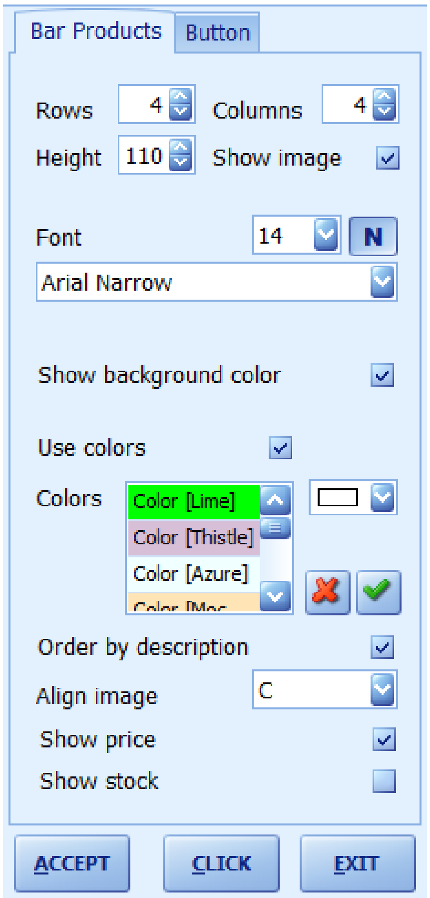
You can modify each element screen with a single click (being in design mode). Just move the mouse over the item to configure and click (left or right button, it's irrelevant).

If you want to see better the the changes on the screen, hide the configuration panel, you can see it again using the same button that you used to hide.

If an item on the screen can be changed, you will see a small screen options with the most relevant parameters by clicking on it. In this small screen, you can change number of rows, columns, the size of the buttons, colors, etc ...

Depending on the item you want to modify, the configuration screens may have more than one tab. On the first tab you will see the panel parameters in general, and the second tab, element parameters (button) you selected. For example, you will see two tabs on the panels of categories, products or actions because these panels have buttons that can have a custom configuration.

Also, at the bottom of each screen configuration, there are 2 or 3 buttons: OK, CLICK and EXIT. OK serves to save the changes. Click button serves to make the original operating element, for example if you click on the product's button screen configuration, the product will be charged on the screen, pressing a category's button, loads on the screen products that belongs this category.



The elements you can modify on screen are: categories, products, favorites, employees (if visible on screen), actions, keyboard, grid, display and logo.

The elements that have the property Click on the settings screen are: Categories: to show and customize your products; products and favorites: to add a product to the sales screen so you can see the possible changes in the grid.

There are also some buttons on panel of actions that have this property. Product's buttons, customers, employees, hold sales, and Exit can simulate a click of the work mode. All these elements, execute the corresponding task, which also will enable the design mode and adjust your display settings, except Exit, which goes out directly from POS.

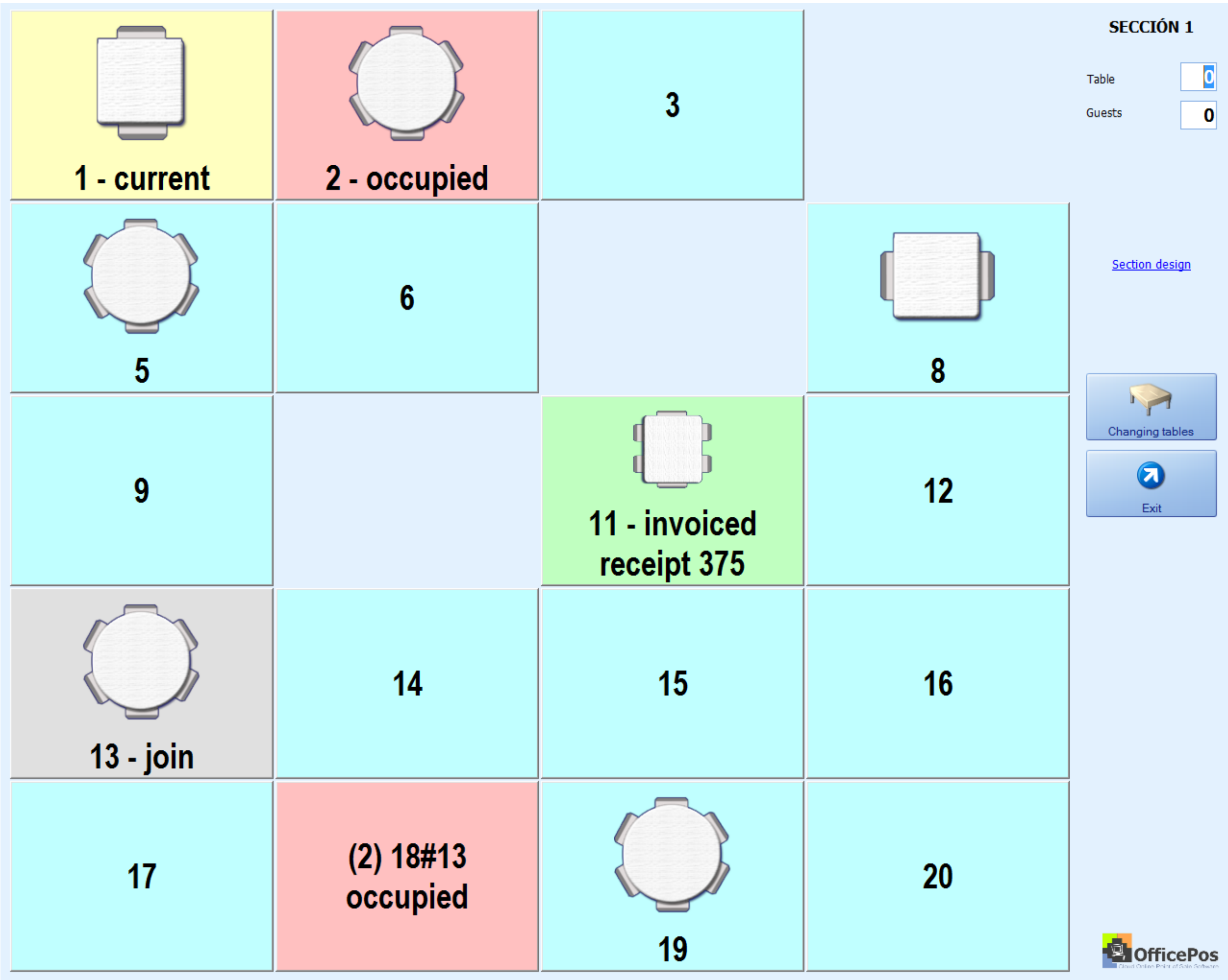
d) Specifications for Hospitality

If your company is in the hospitality industry, you will see default screen: favorite items (for common products like water, bread, coffee ...) and complementary (to complement certain products, as example done, well done, with ice, extra cheese,etc....).

Holding sales are fixed, always the same. The tables design in a section is made from the Sections configurator.

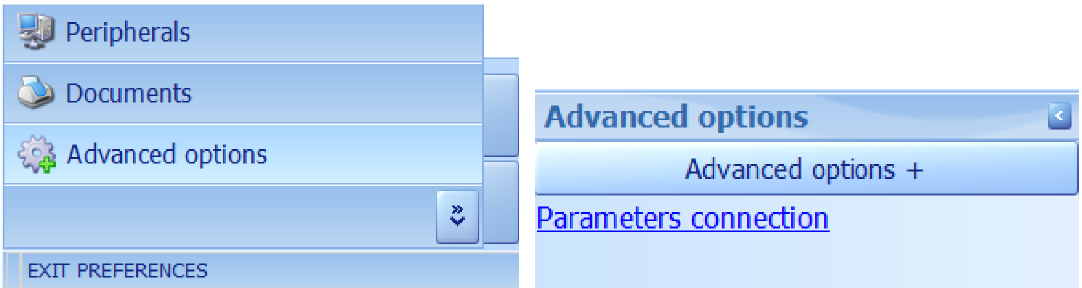
- *Table situation*

In hospitality mode, the tables can have 4 states: Empty, busy, invoice and attached (when accounts 2 or more tables are joined). Each state is identified by a color, you can change it from the Section configuration. 1st color is used to identify a empty table (blue), 2nd color for a busy (red), 3rd invoice (green) and 4th attached (gray).



- *Important parameters*

POS has some parameters that you can enable or disable to work better. To access these settings you will do through the POS Preferences, Advanced options, Advanced options + button.



Next I explain you how they work some:

Impresión➔ Cocina ➔Automática

Send orders to kitchen when the table is left in standby, or changes to another table. If the parameter is disabled, the employee will have to send orders to the kitchen by clicking on the corresponding button in the action toolbar. It is recommended to enable it.

Impresión➔ Cocina ➔AvisosDespuesDeCobrar

Send orders to kitchen after paying. It is recommended to enable this parameter when the establishment's type is Fast Food, where normally charged before serve the customer.

SeleccionMesa➔Formulario➔LiteraSala

This parameter is used to change as calling the different sections that you created (default "section"). You can change the name and call rooms, hall, spaces, dinning rooms etc ...

SeleccionMesa -> Formulario -> SeccionesOcultar

You can chose sections (separated by commas), that you want to disable in POS. So you can have 2 sections, for example bar and dining area, and you decide that from POS bar, can not access dining section tables and reverse. This parameter is useful for multi-sector business.

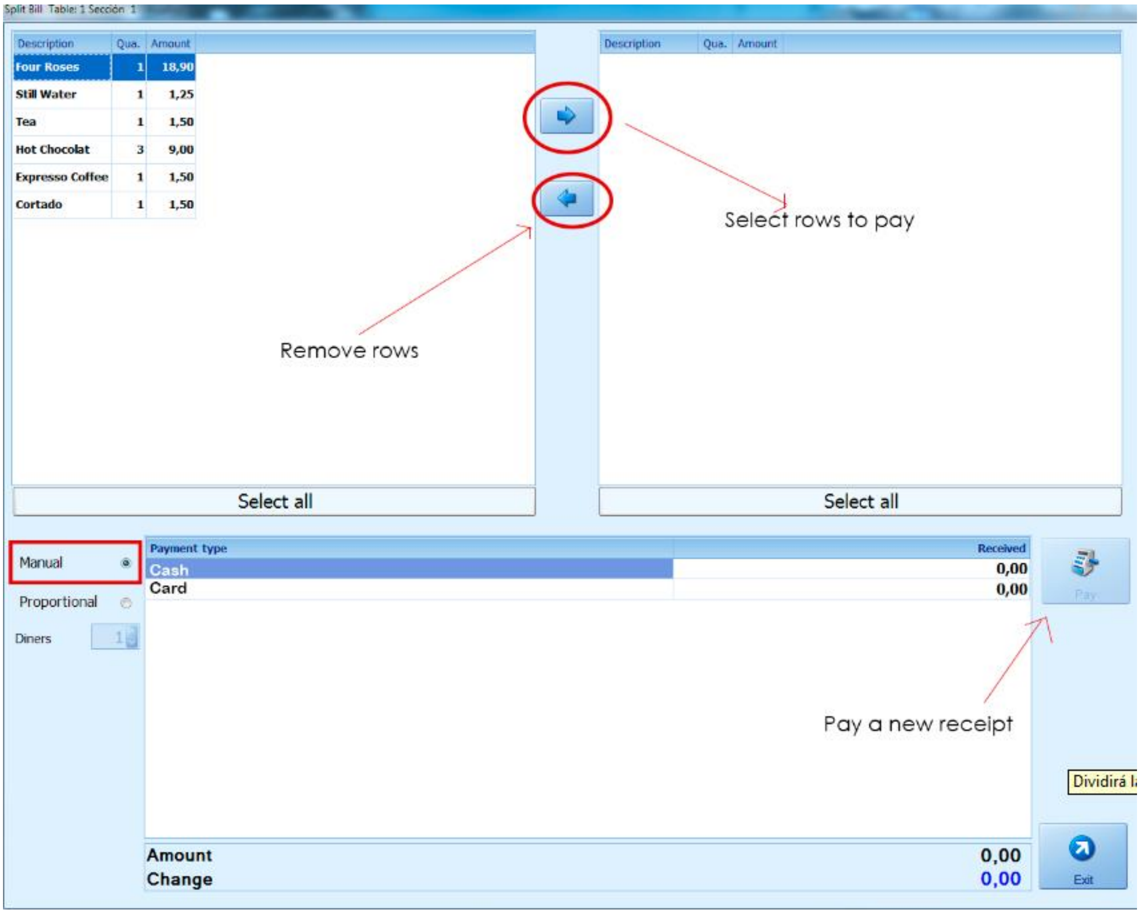
General➔Configuracion➔PermitirModificarVentaFacturada

When receipt is printed, but still has not been effective the pay, the table changes its state to invoice. In that state, by default, the ability to modify any sale's line is disabled. Enabling this parameter, it is possible modification of the table to add or change lines.

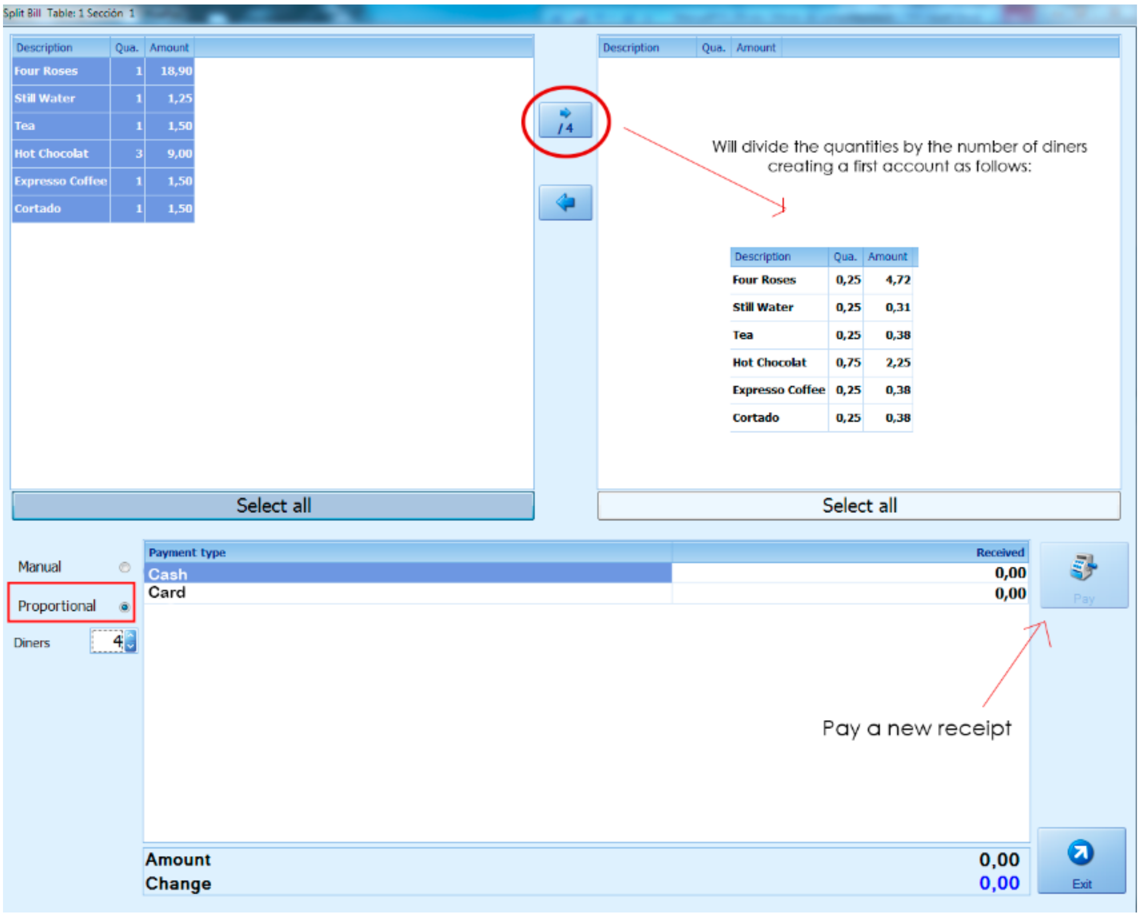
- *Split the bill*

When you go to collect the sale, you have the possibility of charging different accounts, just press the button SPLIT BILL. You will see a screen with all the sale products that you can select to collect them. You have the possibility of sharing equitably account and make as many receipts as diners (proportional) or charge each diner only what has been consumed (manual).

- Split manual accounts: Select the products diner had consumed. If the origin quantity is greater than 1, the incorporation of the product is made one at one unit.



- Split proportional accounts: Select the proportional option and put a number of diners. Automatically is selected full sale and you only just press the incorporation button. OfficePos will divide account proportionally among the diners and subtracting the amount of origin sale.



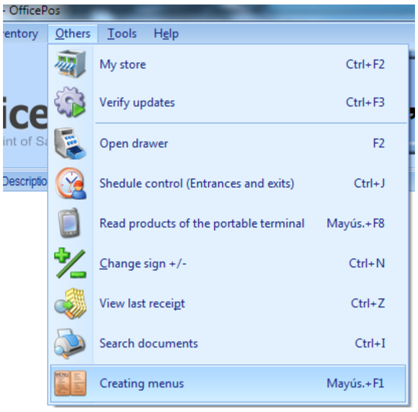
- *Menu*

OfficePos gives you the ability to create menus, these menus can be printed to put on the tables.

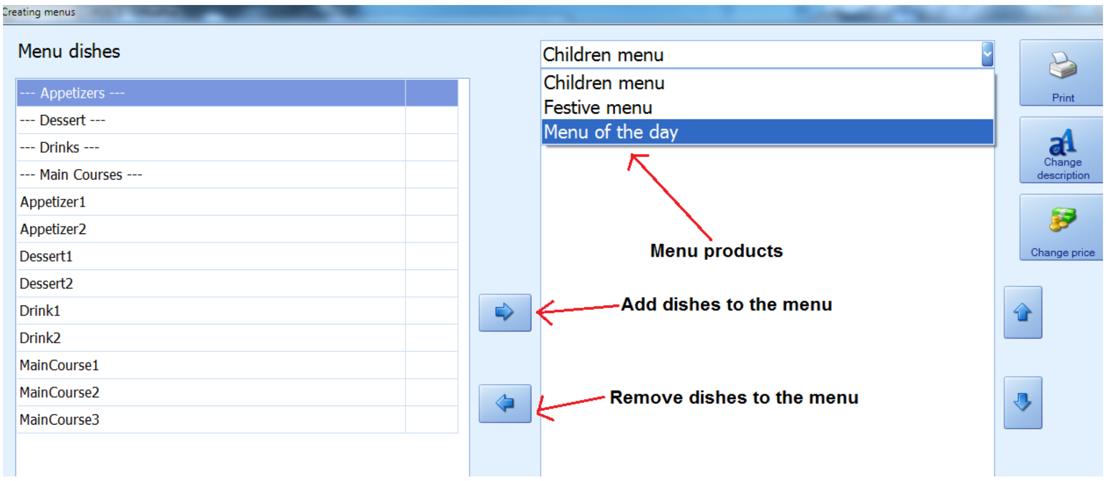
It is advisable to group all the menus into a single cathegory. And use this cathegory code to complete the parameter:

Menu ➔Configuracion ➔FamiliaMenu

To create menus, you press the button on the POS toolbar action, or select the corresponding menu option.



In the menu screen you will see all the dishes to create a menu and different kinds of menu you have created. To add dishes to a menu, just select the corresponding menu and use the buttons to add or remove dishes.



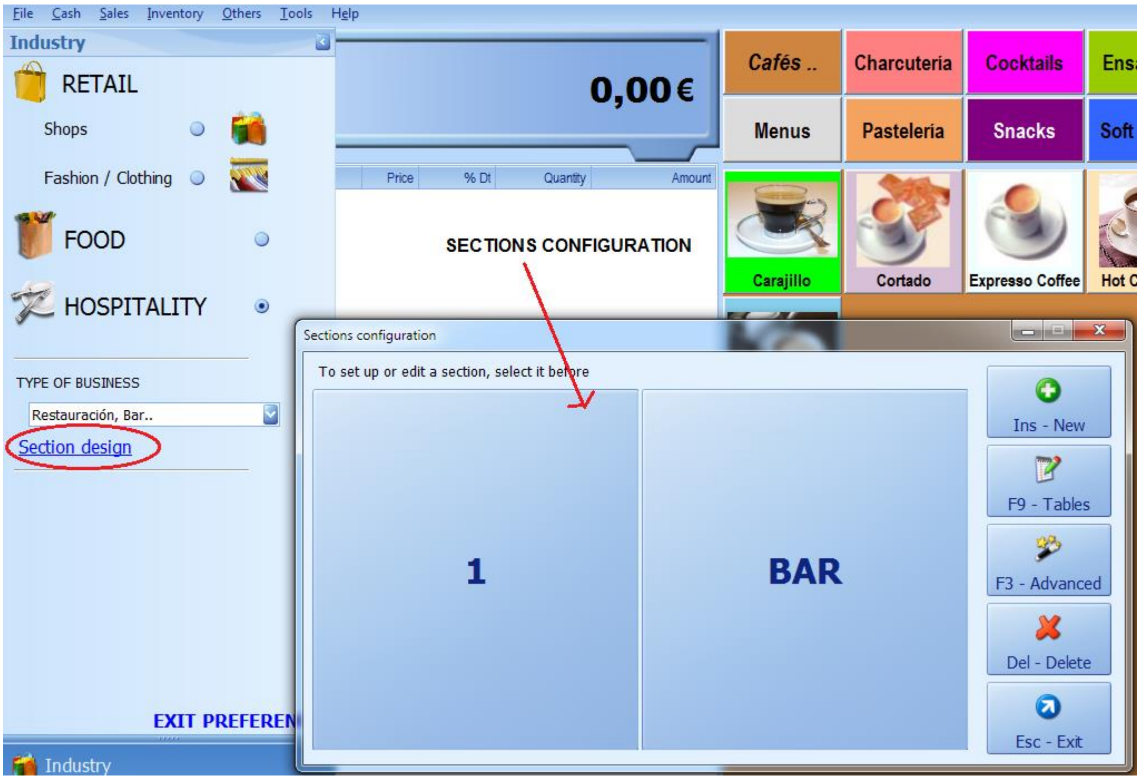
Once you add a dish, you can put on it, and modify its price.

You have to take into account parameter PantallaPrincipal ➔Suplementos ➔ ForzarPrecio0, because if you want to apply a price supplement to the plate, this parameter must be deactivated, if it is enabled, all menu productos are price equal 0 and the final price will be the price of the selected menu.

e) *Store sections*

The creation of different sections in a store serves to differentiate sections of our store (multisectoral business, such as a store where there section butchers, fish market and greengrocers). It also helps to use different prices on the same product from a store (eg, in hospitality, prices are different in the bar section than a table section).

To access the configuration sections change to design mode and select panel Industry-> Section design.



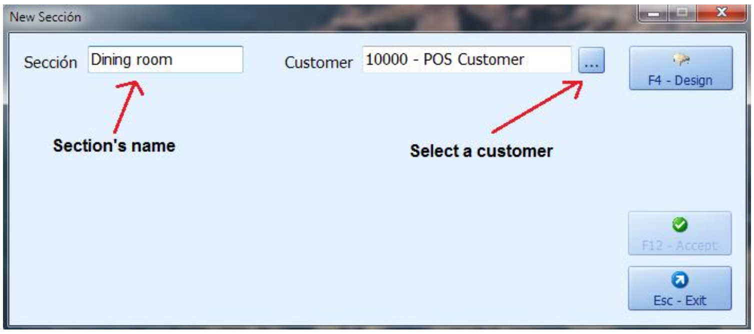
From the sections configurator you can create/edit/delete sections. A section is the terminology used to represent rooms, living rooms, dining rooms or any space that you want to differentiate in the store.

Each section must have a default customer, which carries an associated rate. In some stores is usual to have 2 distinct sections, eg bar prices usually we are not the same price than table, even if the product is the same.

In HOSPITALITY each section has a fixed number of sales that corresponds to the number of existing tables in the section. You can decide how many tables you can have each section.

-Create sections

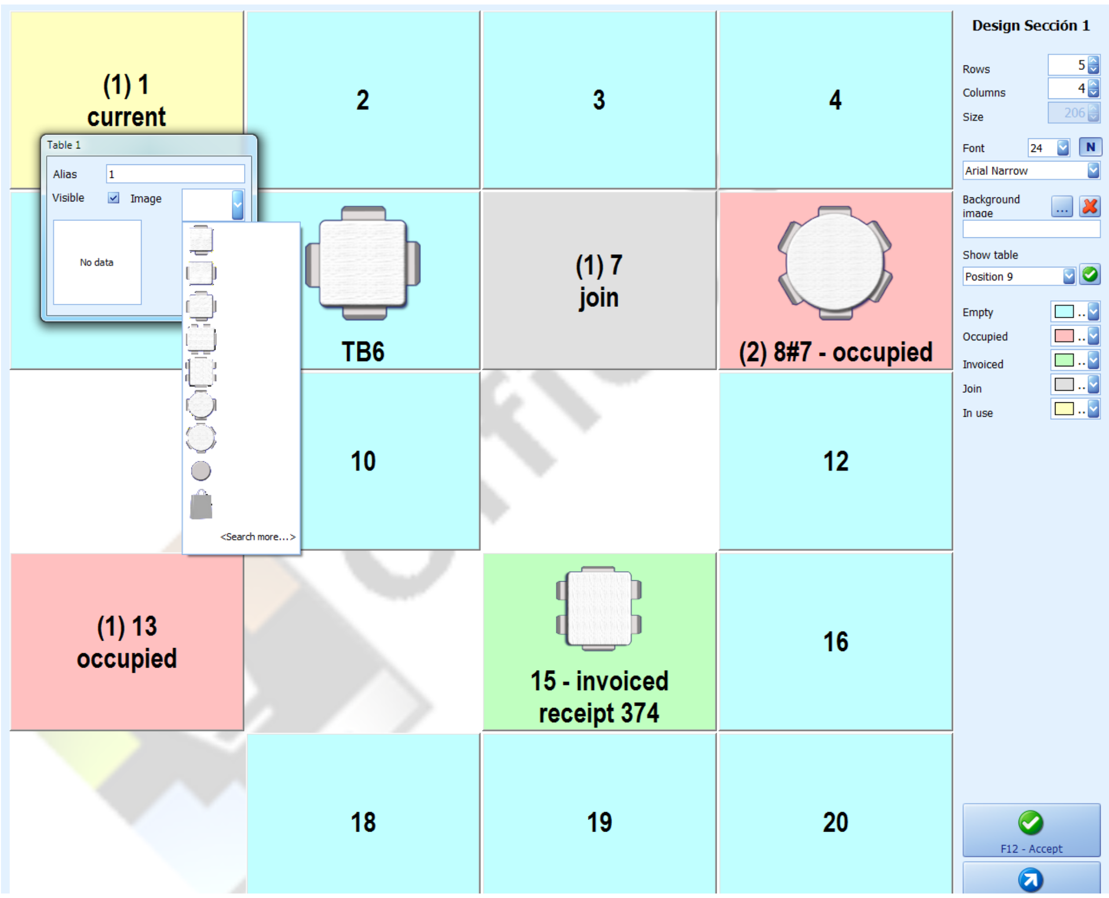
Press the New button to create a new section. You will see the following screen:



The first thing to do is give a name to the section, for example, Dining room. After you select a customer. Customer's rate will used to sale in this section. The selected customer will become the default to do sales in dining room.

To set the tables that belong to this section, click the DESIGN button.

From this new screen you can decide how many tables (rows x columns), colors for different states, text font, an image for background of the section, etc ... If you click on any table, you can put an image, a name or make it invisible in the section. This way you can get to design a similar space that physically you have in store.

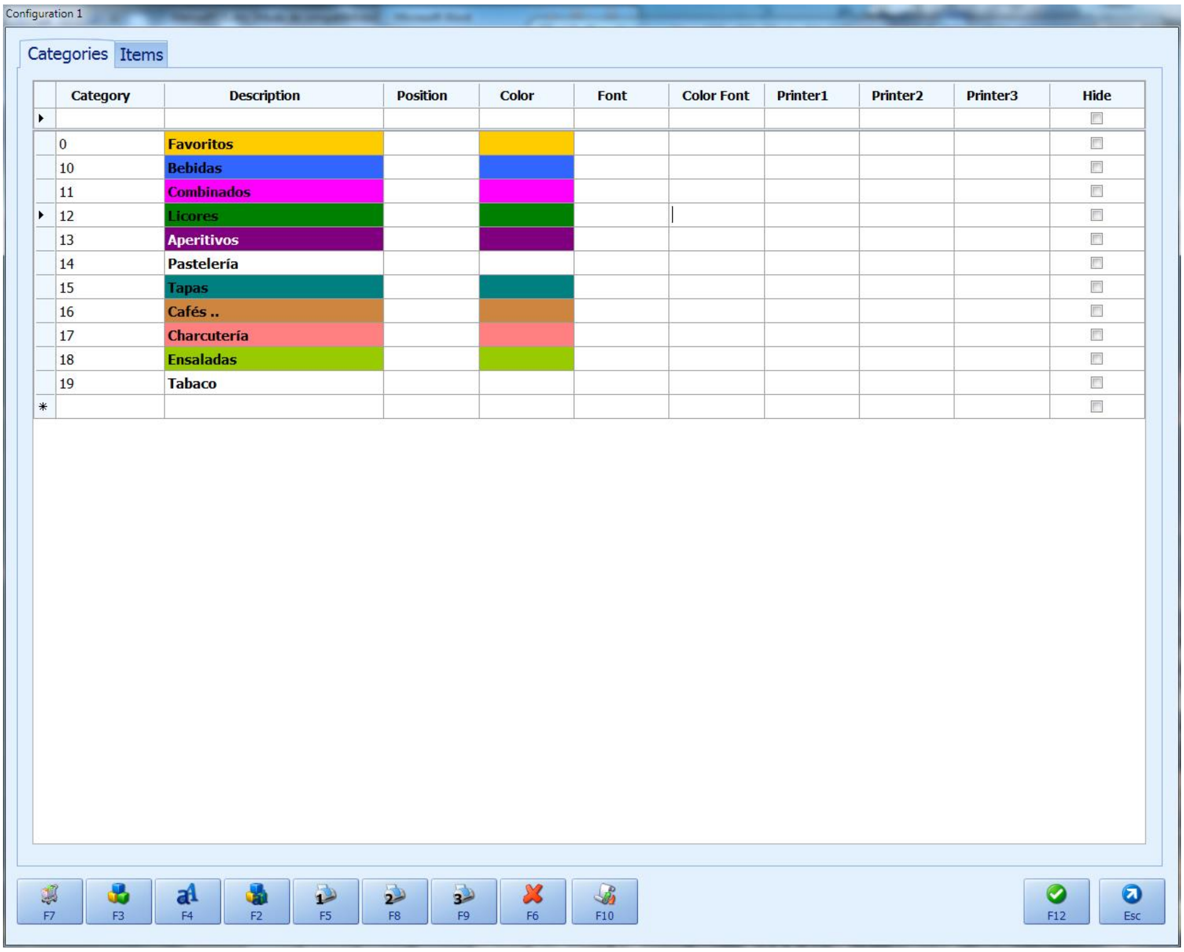


To delete a section, you select the section, and then press DELETE button, you will see a confirmation message because deleting a section you also delete the tables.

-Customize categories / products

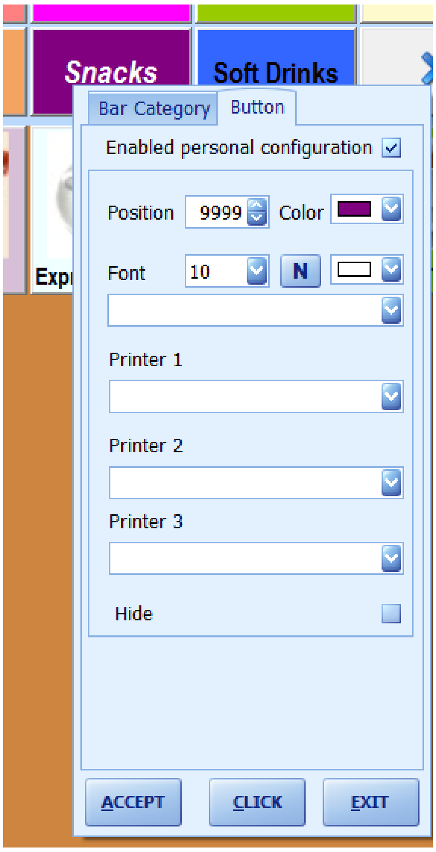
To customize one category or a product, just select the section you want to configure and click the ADVANCED button.

You have to keep in mind that this configuration is a section level. You can have many sections created and each with different screens (different colors or positions to the same categories and/or products) on POS.



Specifications for categories and products are the same, you can select multiple lines at once to simultaneously modify a property, for example to select one kitchen printer for all desserts.

You can also access these specifications from the DESIGN mode, pressing any button (categories or products)



The properties you can modify in each category/product are:

- Bar's position: Position category's/product's button within the bar.
- Button color
- Text font
- Font color
- Kitchen printers: You can select up to 3 possible printers to send orders to the kitchen. If a product has a selected printer, and his category too, always is used the product's printer.
- Hide: To hide the screen POS categories or products.

Important note:

If you have more than one POS, you can choose the kitchen printers among all the printers you have in your different POS. The kitchen printers must be SHARED if you want others POS access them. In the configuring POS devices, printers you want to use common, they have to be in the name, <u>the name of the machine where it is connected and the printer name</u>. This way, all POS know where you are peripheral to send orders and have access to it.

Example:

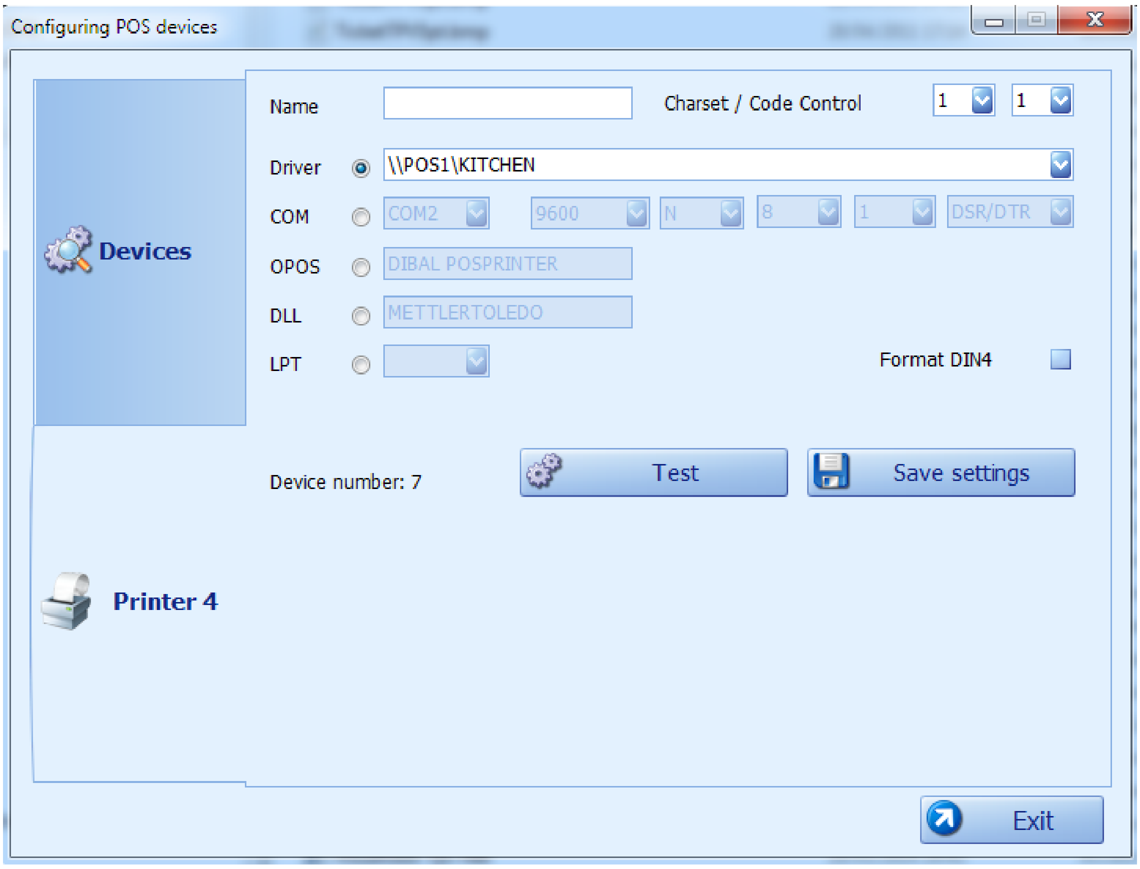
POS1

1- Receipt printer
2- Doc printer
.
.
7- KITCHEN printer

POS2

1- Receipt printer
2- Doc printer

Configure all A category's products, send the order by the kitchen printer, called KITCHEN, connected to POS1 and shared across the network. For the POS2, can send those commands to the printer you have to put in the name of the printer (in configuration) Name: \\POS1\KITCHEN even when the POS1, have it locally and is detected only as KITCHEN.



10. DTI's Configurator

The data source of all the dti's templates are located in the corresponding XML (inside the datos directory). These xml's generated every time a print is made, and in them is the structure of the fields and the data sent to the template.

When you want to add fields to the templates have to look at the xml.

Dti templates are structured in 2 parts: declaration of fields and data structure.

- Dti templates are structured in 2 parts: declaration of fields, and data structure.

```
// Example dti template

 (#IniCampos)
Empresa;Nombre;40;A
Tienda;NombrePais;40;C
Empresa;Web;40;A
Empresa;Nif;15;A
Tienda;NumeroDeTienda;3;A
..
(#IniSeccion)
(#CHARTABLE)
//(#LOGO)
(#DOBLE)(#BOLD)%Tienda;Nombre%(#BOLD_F)(#DOBLE_F)(#LF)(#LF)
(#COMPRES)%Empresa;Nombre% / %Tienda;Domicilio% / %Tienda;CodigoPostal%
%Tienda;Poblacion% / Tel.: %Tienda;Telefono1% / Nif: %Empresa;Nif% /
%Empresa;Web%(#COMPRES_F)(#LF)
(#LF)
T%Tienda;NumeroDeTienda%C%Caja;NumeroDeCaja%  %General;FechaOperacion%
%General;HoraOperacion% (#COPIA)(#LF)
(#LF)
(#DOBLE)            COBRO(#DOBLE_F)(#LF)
----------------------------------------(#LF)
@EVAL(%Cliente;CodigoDeCliente%<>;Cliente:    %Cliente;CodigoDeCliente%
%Cliente;Nombre%)@EVAL(%Cliente;CodigoDeCliente%<>;(#LF))
@EVAL(%General;Concepto%<>;Concepto:    %General;Concepto%)
@EVAL(%General;Concepto%<>;(#LF))
@EVAL(%General;Descripcion%<>;Descripción:
%General;Descripcion%)@EVAL(%General;Descripcion%<>;(#LF))
(#LF)
(#BOLD)Forma de Pago              Importe(#BOLD_F)(#LF)
----------------------------------------(#LF)
(#FinSeccion)
(#IniDetalle;Importes)
%Importes;DocumentoDePago%      %Importes;ImporteDivisaOrigen%(#LF)
(#FinDetalle;Importes)
----------------------------------------(#LF)
                (#DOBLE)Total: %General;ImporteTotal%(#DOBLE_F)(#LF)
(#IniSeccion)
(#LF)
Le Atendió: %Vendedor;Nombre%(#LF)
      Gracias por su visita.(#LF)
(#LF)
(#LF)
```

- <u>declaration of fields include the following:</u>

Example: General;ImporteTotalVenta;9;D;2;S;M

Equivalent to:

TableName;NameField;Length;Alignment;Decimals;SeeZeros;RemoveThousandsDot

- *TableName* : Name of the table found in the corresponding xml.
- *NameField*: Name of field found in the corresponding xml.
- *Length*: Number of positions to be occupied by the data, are used or not.
- *Alignment*: D (Right), I (Left), C (Center), A (Adjust).
- *Decimals*: Number of decimal.
- *SeeZeros*: S - If a numerical value is equal to 0, this will not show 0 (ex. in discounts)
- *RemoveThousandsDot*: M – To delete the thousands dot and save up a position.

- <u>Data structure</u>

Printer understood sequences and replaced by the following:

//	: Comment, what you are after is not interpreted.
#LOGO	: Logo on printer's memory
#DOBLE	: Double height font.
#DOBLE_F	: End double height font
#BOLD	: Bold
#BOLD_F	: End bold
#COMPRES	: Small font
#COMPRES_F	: End small font
#LF	: NewLine.

The way to use the fields declared in the data structure is as follows:

%TableName;FieldName**%** ex: **%**Empresa;Nombre**%**

Another structure to consider is the @ EVAL. This structure is the mode condition: If X then Y

@EVAL(%Cliente;CodigoDeCliente%<>5;Cliente: %Cliente;CodigoDeCliente%)

Which is interpreted as follows:

If %Cliente;CodigoDeCliente% is different than 5, then *print* Cliente: %Cliente;CodigoDeCliente%